SPECIAL PULL-OUT: OUR 1987 PROMOTIONAL CALENDAR!

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Military Market

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Bill Bennett of William Bennett Associates.

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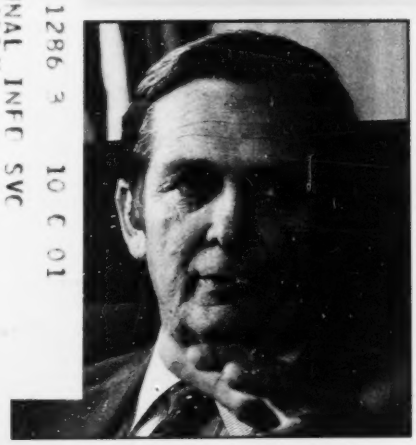


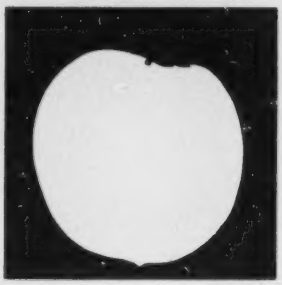
INTERVIEW — Has Exchange Credit Hurt Small Business?

Rep. Marvin Leath, the only member of the Morale, Welfare and Recreation Panel to vote against credit cards for exchanges, may be the next chairman of the House Armed Services Committee.

contents

OCTOBER 1986 VOL. 37, NO. 10

AMERICAN LOGISTICS ASSOCIATION Atlanta, Georgia



Oh, Atlanta! — page 74.

4 **Editorial**

6 **News** — Commissary board will publish annual report. Morale at NAVRESSO at a low point, but cash bonus test is a success. 1987 catalogs are out. Gen. Chavarrie urges vigilance in fight for personnel benefits. And yet more analysis on Gramm-Rudman cuts.

16 **Letters to the Editor** — Veterinary Service "unfairly maligned," writes a former TSA commander.

17 **Annual Promotional Calendar for 1987**

29 **Market Report** — Beating the bran blahs.

37 **Market Report** — Tobacco's new frontiers: more savings, many more brands.

46 **Market Report** — Is the beauty biz really bottoming out?

55 **COVER STORY** — The special relationship: Advertising to the military.

62 **On the Firing Line** — A talk with Rep. Marvin Leath of Texas.

74 **Schedule of Events** — Your datebook for the 39th annual ALA convention.

76 **Opinion**

78 **Supplier Notes/ Troop Maneuvers**

80 **System of the Month** — ACOS: AFCOMS' birthday present.

83 **Promos**

84 **News Update**

86 **New Products**

89 **Classified Ads**

90 **Military Market Index**

91 **Com-Ex Comix/Ad Index**

92 **Calendar**

COVER PHOTOGRAPHS BY KATE PATTERSON AND TRACY WOODWARD
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serving the military resale system

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Beating the Bran Blahs

Adult desire for tastier high-fiber, bran cereals influences the market and helps create new entries containing fruit. PLUS: Detailed data on cereals sold in the commissaries.

By BEVERLY M. JONES
Associate Editor

THE TOP-SELLING CEREAL in U.S. commissaries during June was the 20-ounce size of Kellogg's Frosted Flakes, according to data compiled by the research department of the Army Times Publishing Company.

The data show that 261,941 boxes of this size of the cereal were sold, at a value of $509,053. Army commissaries accounted for the largest share of the dollar volume (49.5 percent), followed by Air Force (38.7 percent) and Navy (11.8 percent).

Marine Corps commissaries were not tracked, because none of them are currently using scanners at the front end.

The No. 2 seller in the cereals department was General Mills' Cheerios, in the 15-ounce size. This size sold 216,171 units, valued at the cash register at $374,620.

The one-two commissary ranking of Frosted Flakes and Cheerios is the same as in the civilian marketplace.

The data, based on a sample of seven Army, 27 Navy and 33 Air Force commissaries, are statistically projected to all 229 commissaries in the United States. Dollar sales and unit volumes were tracked at cash registers in the 67 stores surveyed.

Market Trends

Cereal manufacturers hope to beat the bran blahs with jazzed-up fruit and nut cereal combinations. High fiber cereals, they hope, will pull more adults into the cereal market.

According to industry analyst John Maxwell, cereal tonnage was up 4 percent in 1985 — to 2.17 billion pounds from 2.09 billion pounds in 1984. In dollars, the market increased 9.8 percent, going to $4.45 billion in 1985 from $4.05 billion in 1984.

The increases were due to the popularity of the adult cereal market. Adult bran varieties "grew six times faster than the market" as a whole. They now have roughly 10 percent of the market, said Maxwell, currently an analyst for Furman Selz Mager Dietz & Birney.

The adult segment of the ready-to-eat cereal field has grown tremendously over the last few years. "The high-fiber and bran cereal market continues to expand and has been doing extremely well over the last two years," said Caroline Fee, manager of public relations for Nabisco Brands USA.

People used to eat cereal for breakfast, because it tasted good and was quick to eat. Now consumers buy low-sugar high-fiber cereals for their health *and* because it tastes good.

Post introduced a Fruit & Fibre line in 1984 with three fruit and nut varieties: Harvest Medley, Tropical Fruit and Mountain Trail. The line provides the fiber content adults seek without sacrificing taste, said Trecie Fennell, a spokeswoman for General Foods, which manufactures Post cereals.

Kellogg's says that, with 15 different cereals, it holds the No. 1 position in the bran/fiber market. It introduced All-Bran Fruit & Almond cereal in July of this year as an addition to its regular All-Bran line of cereals.

Generals Mills introduced Fiber One and Raisin Nut Bran last year. Nabisco Brands USA is currently test-marketing a new cereal in the West called Fruit Wheats. "They resemble our spoon-size Shredded Wheat but with fruit inside," a Nabisco Brands USA spokeswoman said.

In another effort to appeal to the adult market, General Foods took the sugar out of Post Raisin Bran and renamed it Natural Raisin Bran. Post's competition, Kellogg's, left the sugar in its Raisin Bran.

In 1985, in terms of total market shares, Kellogg's Frosted Flakes snagged the No. 1 slot away from General Mills' Cheerios, Maxwell said. Kellogg's Corn Flakes took the third place slot and Kellogg's Raisin Bran took fourth place.

Kid's Stuff

New cereals featuring licensed characters are still risky, since children's tastes change with every television show.

However, pre-sweetened cereals are still big in commissaries; families shopping with children usually end up with a pre-sweetened cereal in their over-flowing carts.

"We sell a higher share of children's cereals in the military because of the larger families," said Bill Kastor, military marketing manager of General Mills.

Other than that, Kastor said, there wasn't much difference between the civilian and military markets — except the lack of shelf space in commissaries.

It is difficult to pick a licensed character for cereals that will still be popular with children by the time it gets on the shelves. Most licensed cereals have a very short shelf life, about six months to a year.

Quaker Oats' pre-sweetened Mr. T cereal lasted six months in 1984. Donkey Kong cereal, based on a popular video game, turned out to be a disappointment for Ralston Purina the same year.

General Foods licensed the Smurfs cartoon characters for its Smurfberry Crunch, a presweetened corn, oat and wheat based cereal. Smurfberry Crunch is the only licensed cereal the company has. "We're very conservative about licensing cereals," said spokeswoman Fennell.

Many cereal manufacturers continue to capitalize on their own characters as marketing tools.

Tony the Tiger, Cap'n Crunch and the Lucky Charm leprechaun have sold cereals to children for years. MM

CEREALS — June 1986 Sales for All U.S. Commissaries

COMPANY	PRODUCT	UPC NUMBER	AMOUNT OF UNITS	U.S. DOLLARS	% OF AIR FORCE	% OF ARMY	% OF NAVY
KELLOGG'S	KELLOGG'S FROSTED FLAKES 20 OZ.	38000 015200	261,941	509,053	38.7	49.5	11.8
GENERAL MILLS GROC PROD DIV	CHEERIOS 15.0 OZ.	16000 666100	216,171	374,620	38.4	48.8	12.9
KELLOGG'S	KELLOGG'S FROOT LOOPS 15 OZ.	38000 017200	170,093	353,334	37.0	49.6	13.4
GENERAL MILLS GROC PROD DIV	HONEY NUT CHEERIOS 14.0 OZ.	16000 665900	186,711	329,026	40.9	41.9	17.3
KELLOGG'S	KELLOGG'S RAISIN BRAN 20 OZ.	38000 008200	169,720	319,917	42.7	43.8	13.5
KELLOGG'S	KELLOGG'S RICE KRISPIES 13 OZ.	38000 005200	168,758	268,391	35.6	50.6	13.9
GENERAL MILLS GROC PROD DIV	LUCKY CHARMS 14.0 OZ.	16000 688700	134,389	246,999	44.9	39.2	15.9
KELLOGG'S	KELLOGG'S FROSTED MINI-WHEATS 16 OZ.	38000 027200	126,254	205,760	40.3	44.9	14.8
GENERAL FOODS CORPORATION	GRAPE NUTS 24 OZ.	43000 105210	118,484	205,272	46.5	36.3	17.3
NABISCO BRANDS, GROCERY DIV	SPOON SIZE SHREDDED WHEAT, 18 OZ.	13130 000540	114,859	201,712	47.4	35.4	17.2
QUAKER OATS COMPANY	CAP'N CRUNCH, 16 OZ. JUMBO	30000 065200	119,995	201,080	34.7	51.0	14.2
GENERAL MILLS GROC PROD DIV	TOTAL 12.0 OZ.	16000 658500	113,384	191,093	38.7	43.7	17.6
GENERAL MILLS GROC PROD DIV	TRIX 12 OZ.	16000 674400	103,974	183,543	42.4	42.6	14.9
GENERAL FOODS CORPORATION	RAISIN BRAN 20 OZ.	43000 114600	102,309	180,322	36.9	45.9	17.2
KELLOGG'S	KELLOGG'S CORN FLAKES 18 OZ.	38000 001200	130,984	176,175	36.6	43.9	19.5
KELLOGG'S	KELLOGG'S CORN FLAKES 24 OZ.	38000 001270	89,594	156,216	39.5	49.0	11.5
KELLOGG'S	KELLOGG'S CORN POPS 15 OZ.	38000 010110	79,325	155,267	35.4	48.0	16.6
KELLOGG'S	KELLOGG'S RAISIN BRAN 25.5 OZ.	38000 008280	64,401	147,312	41.0	32.1	26.9
KELLOGG'S	KELLOGG'S CRISPIX 14 OZ.	38000 035000	82,555	137,452	44.4	36.7	18.9
GENERAL MILLS GROC PROD DIV	COCOA PUFFS 12.0 OZ.	16000 681700	77,571	135,478	38.6	43.7	17.7
KELLOGG'S	KELLOGG'S COCOA KRISPIES 11 OZ.	38000 011110	63,315	127,763	41.9	41.6	16.5
GENERAL MILLS GROC PROD DIV	WHEATIES, 18.0 OZ.	16000 662100	70,105	120,495	41.3	43.3	15.4
QUAKER OATS COMPANY	CAP'N CRUNCH'S CRUNCH BERRIES 15 OZ.	30000 065600	67,290	120,136	39.7	49.8	10.5
KELLOGG'S	KELLOGG'S HONEY SMACKS 18 OZ.	38000 012110	60,862	118,844	35.9	46.8	17.3
GENERAL MILLS GROC PROD DIV	CHEERIOS 20.0 OZ.	16000 666600	51,765	116,910	58.1	11.6	30.3
KELLOGG'S	KELLOGG'S RICE KRISPIES 19 OZ.	38000 005350	53,483	116,538	56.5	21.4	22.2
GENERAL FOODS CORPORATION	SUPER SUGAR CRISP 18 OZ.	43000 117600	66,387	116,360	42.7	43.7	13.7
NABISCO BRANDS, GROCERY DIV	NABISCO SHREDDED WHEAT, 15 OZ	13130 000050	74,441	112,312	50.4	36.6	12.9
KELLOGG'S	KELLOGG'S BRAN FLAKES 16 OZ.	38000 006110	78,161	112,013	41.7	38.9	19.4
GENERAL FOODS CORPORATION	PEBBLES, FRUITY 11 OZ.	43000 129700	69,491	107,106	38.8	48.3	12.9
KELLOGG'S	KELLOGG'S APPLE JACKS 15 OZ.	38000 029200	50,104	106,314	62.8	19.2	18.0
RALSTON PURINA COMPANY	RALSTON RICE CHEX 12 OZ.	17800 182700	78,832	100,920	40.2	42.4	17.4
KELLOGG'S	KELLOGG'S FROST POP-TARTS STRAW. 11 OZ.	38000 317000	104,552	98,452	38.2	45.2	16.6
QUAKER OATS COMPANY	LIFE CEREAL 20 OZ., JUMBO	30000 061100	51,712	95,591	47.5	34.7	17.8
KELLOGG'S	KELLOGG'S SPECIAL K 18 OZ.	38000 016210	40,757	91,420	55.2	26.9	17.9
GENERAL MILLS GROC PROD DIV	CINNAMON TOAST CRUNCH 14.0 OZ.	16000 657000	55,308	89,191	48.6	36.0	15.4
KELLOGG'S	KELLOGG'S APPLE JACKS 11 OZ.	38000 029100	51,597	84,232	9.6	75.8	14.6
RALSTON PURINA COMPANY	RALSTON WHEAT CHEX 15 OZ.	17800 152600	69,310	82,846	38.7	43.5	17.8
GENERAL FOODS CORPORATION	FRUIT & FIBRE W/DATES,RAIS.,WALNUTS 14 OZ.	43000 104500	53,685	82,841	42.9	37.6	19.5
KELLOGG'S	KELLOGG'S JUST RIGHT RAIS/DATE/NUT 12.7 OZ	38000 041000	51,052	82,520	49.0	39.7	11.3
KELLOGG'S	KELLOGG'S RAISIN SQUARES 16.5 OZ.	38000 037000	45,826	79,130	55.2	24.9	19.9
NABISCO BRANDS, INC.	NABISCO SHREDDED WHEAT 'N BRAN 12 OZ.	13130 000580	60,459	78,334	57.4	25.5	17.1
GENERAL MILLS GROC PROD DIV	PAC-MAN 13.0 OZ.	16000 668800	42,697	77,763	30.1	54.1	15.9
KELLOGG'S	KELLOGG'S APPLE RAISIN CRISP 13 OZ.	38000 039000	45,901	77,046	43.9	38.3	17.8
GENERAL FOODS CORPORATION	ALPHA BITS 15 OZ.	43000 118170	46,568	76,091	39.4	46.9	13.7
QUAKER OATS COMPANY	QUAKER OATS QUICK, 18 OZ.	30000 011800	74,703	75,454	37.9	48.4	13.7
GENERAL MILLS GROC PROD DIV	GOLDEN GRAHAM 18.0 OZ.	16000 679700	39,643	74,695	45.1	52.4	2.5
GENERAL FOODS CORPORATION	HONEYCOMB 14 OZ.	43000 111700	41,789	74,355	47.9	44.0	8.1
KELLOGG'S	KELLOGG'S VARIETY 12 TRAYS 10 IND.	38000 053310	46,513	72,858	30.0	50.2	19.8
QUAKER OATS COMPANY	INSTANT OATMEAL APPLES & CINN. 12.5 OZ.	30000 013800	45,026	72,802	45.0	38.3	16.7
KELLOGG'S	KELLOGG'S FROST. POP-TARTS CHOC.FDG.11OZ	38000 313000	77,686	72,613	39.5	43.8	16.7
GENERAL FOODS CORPORATION	FRUIT & FIBRE W/TROPICAL FRUIT 14 OZ.	43000 104540	45,743	71,945	42.0	40.7	17.3
QUAKER OATS COMPANY	QUAKER OATS QUICK, 42 OZ.	30000 012000	39,807	70,915	39.5	42.3	18.2
RALSTON PURINA COMPANY	RALSTON CORNCHEX 12 OZ.	17800 192660	61,137	69,204	25.3	52.0	22.7
QUAKER OATS COMPANY	INSTANT OATMEAL MAPLE & BRN. SUG. 15 OZ.	30000 011900	42,406	68,537	47.3	36.8	15.9
KELLOGG'S	KELLOGG'S FROST POP-TARTS CINN. 10.5 OZ	38000 311000	73,344	65,116	41.4	43.0	15.6
KELLOGG'S	KELLOGG'S NUTRI-GRAIN WHEAT&RAIS. 15 OZ.	38000 105000	35,827	64,625	41.5	35.5	23.0
KELLOGG'S	KELLOGG'S FROST. POP-TARTS CHERRY 11 OZ.	38000 318000	70,185	64,606	42.2	43.9	13.9
KELLOGG'S	KELLOGG'S HONEY & NUT CORN FLAKES 16 OZ.	38000 004010	35,000	63,915	47.4	38.5	14.1
KELLOGG'S	KELLG'S.NUTRI-GRAIN ALMOND RAIS. 14.3 OZ	38000 106000	33,379	62,266	58.0	34.1	7.8
GENERAL FOODS CORPORATION	FRUIT & FIBRE HARVEST MEDLEY 13 OZ.	43000 104590	40,353	61,863	42.2	40.8	17.1
KELLOGG'S	KELLOGG'S SPECIAL K 12 OZ.	38000 016110	37,191	61,512	29.5	55.2	15.2
THE QUAKER OATS COMPANY	GRANOLA DIPPS CHOCOLATE CHIP 6 OZ.	30000 062900	44,430	61,314	52.1	29.1	18.9
KELLOGG'S	KELLOGG'S FRUITFUL BRAN 14.3 OZ.	38000 036010	36,919	61,213	46.4	37.3	16.3
QUAKER OATS COMPANY	CAP'N CRUNCH'S P. BUTTER CEREAL 15 OZ.	30000 065000	35,695	61,056	28.8	53.8	17.4
KELLOGG'S	KELLOGG'S ALL BRAN 13.8 OZ.	38000 014000	47,071	58,298	42.5	31.5	26.0
KELLOGG'S	KELLOGG'S POP-TARTS STRAWBERRY 11 OZ.	38000 304000	62,753	58,143	35.4	53.5	11.2
QUAKER	100% NATURAL CEREAL W/RAISINS&DATES 16OZ	30000 066800	34,428	56,253	32.1	46.3	21.5
KELLOGG'S	KELLOGG'S FROST.POP-TARTS BLUEBER.11 OZ.	38000 310000	60,802	55,996	41.5	43.5	15.1
KELLOGG'S	KELLOGG'S PRODUCT 19 12 OZ.	38000 019120	34,210	55,866	52.0	27.8	20.3
GENERAL FOODS CORPORATION	FRUIT & FIBRE MOUNTAIN TRAIL 14 OZ.	43000 104580	34,738	53,384	38.5	47.8	13.6
GENERAL MILLS GROC PROD DIV	GOLDEN GRAHAM 12.0 OZ.	16000 680500	35,373	52,362	36.0	33.5	30.5
KELLOGG'S	KELLOGG'S CRACKLIN' OAT BRAN 14 OZ.	38000 045100	26,672	51,853	65.1	11.9	23.0
QUAKER OATS COMPANY	INSTANT OATMEAL FLAVOR VARIETY 13.25 OZ.	30000 014600	32,825	51,163	36.5	43.6	19.9
GENERAL FOODS CORPORATION	HORIZON TRAIL MIX 10 OZ.	43000 125000	35,163	50,778	48.1	39.3	12.6
QUAKER OATS COMPANY	QUAKER OATS REGULAR, 18 OZ.	30000 010200	49,648	50,313	39.0	44.1	16.9
QUAKER OATS COMPANY	CHEWY GRANOLA BARS CHOCOLATE CHIP 8 OZ.	30000 068400	34,798	49,379	53.9	24.2	21.8
RALSTON PURINA COMPANY	COOKIE CRISP CHOC. CHIP 16 OZ.	17800 155290	26,713	49,211	34.9	52.2	12.9
RALSTON PURINA COMPANY	ALMOND DELIGHT 15 OZ.	17800 132170	33,899	47,837	53.3	37.1	9.6
KELLOGG'S	KELLG'S. FRST. POP-TARTS DUTCH APPLE 11 OZ.	38000 312000	52,057	47,769	47.8	34.2	18.0

CEREALS — June 1986 Sales for All U.S. Commissaries

COMPANY	PRODUCT	UPC NUMBER	AMOUNT OF UNITS	U.S. DOLLARS	% OF AIR FORCE	% OF ARMY	% OF NAVY
GENERAL FOODS CORPORATION	40% BRAN FLAKES 16 OZ.	43000 113130	34,976	46,849	40.4	52.1	7.5
GENERAL FOODS CORPORATION	RAISIN GRAPE NUTS 24 OZ.	43000 106000	23,602	46,745	51.6	37.4	11.0
KELLOGG'S	KELLOGG'S FROSTED FLAKES 25 OZ.	38000 015270	20,552	46,194	23.3	54.5	22.3
KELLOGG'S	KELLOGG'S ALL BRAN 10 OZ.	38000 040000	37,696	46,109	58.1	32.8	9.1
GENERAL MILLS	S'MORES CRUNCH 14 OZ.	16000 654000	24,930	45,202	55.9	19.4	24.8
GENERAL FOODS CORPORATION	RAISIN BRAN 25 OZ.	43000 114700	21,777	44,630	79.4	13.5	7.1
NABISCO BRANDS, GROCERY DIV	CREAM OF WHEAT, QUICK, 28 OZ.	13130 006120	28,680	43,949	45.2	38.8	16.0
GENERAL MILLS GROC PROD DIV	CRISPY WHEATS AND RAISINS 12 OZ.	16000 684000	35,806	43,703	17.2	53.1	29.7
GENERAL FOODS CORPORATION	POST TOASTIES 18 OZ.	43000 107130	44,070	43,423	46.0	47.8	6.1
GENERAL MILLS GROC PROD DIV	FRUIT ROLL-UPS STRAWBERRY 4.0 OZ.	16000 480700	31,406	42,703	79.7	9.5	10.8
NABISCO BRANDS, GROCERY DIV	NABISCO 100% BRAN, 17 OZ.	13130 000320	29,880	42,604	50.6	31.9	17.4
QUAKER	100% NATURAL CEREAL 16 OZ.	30000 066400	27,553	42,460	40.2	48.1	11.7
QUAKER OATS COMPANY	INSTANT OATMEAL STRAWBR & CRM. 12.5 OZ	30000 014200	27,013	41,991	41.2	44.6	14.2
KELLOGG'S	KELLOGG'S NUTRI-GRAIN WHEAT 12 OZ.	38000 104000	31,132	41,935	48.6	27.5	23.9
QUAKER	NATURAL INSTANT OATMEAL 12 OZ.	30000 013300	25,774	41,438	39.7	49.2	11.1
QUAKER OATS COMPANY	CORN BRAN 16 OZ.	30000 068600	24,078	41,242	42.3	43.7	14.1
GENERAL MILLS GROC PROD DIV	FRUIT BAR STRAWBERRY 4.8 OZ.	16000 492300	29,205	40,750	68.0	24.6	7.4
RALSTON PURINA COMPANY	SUN FLAKES CORN & RICE 15 OZ.	17800 121110	29,194	40,700	47.3	37.1	15.5
GENERAL MILLS GROC PROD DIV	KIX 9.0 OZ.	16000 663100	32,088	39,665	41.8	46.2	12.0
GENERAL FOODS CORPORATION	PEBBLES, COCOA 11 OZ.	43000 129500	25,692	39,503	57.7	35.7	6.6
QUAKER OATS COMPANY	INSTANT OATMEAL PEACHES 'N CREAM 12.5 OZ.	30000 013900	24,650	38,223	52.2	36.3	11.5
RALSTON PURINA COMPANY	FRUIT RINGS 15 OZ.	17800 169840	27,312	37,978	42.2	57.8	0.0
GENERAL MILLS GROC PROD DIV	GRANOLA BAR HONEY & OATS 10.0 OZ.	16000 486000	27,448	36,821	34.1	42.7	23.1
RALSTON PURINA COMPANY	RAISIN BRAN 20 OZ.	17800 194150	28,456	35,063	59.8	20.8	19.4
GENERAL MILLS GROC PROD DIV	CRISPY WHEATS AND RAISINS 18 OZ.	16000 684500	21,227	34,834	85.2	14.8	0.0
KELLOGG'S	KELLOGG'S ALL-GRAIN 10.5 OZ.	38000 042000	25,186	34,815	60.0	30.4	9.6
RALSTON PURINA COMPANY	CORN CHEX 17.5 OZ.	17800 193210	22,438	34,797	74.5	24.2	1.3
KELLOGG'S	KELLG'S. RICE KRISPIE BAR P. BTR. 8 OZ.	38000 351000	26,316	34,138	61.6	21.8	16.6
GENERAL MILLS GROC PROD DIV	FRUIT ROLL-UPS GRAPE 4.0 OZ.	16000 480500	24,659	33,385	73.0	16.1	10.8
GENERAL FOODS CORPORATION	GRAPE NUT FLAKES 18 OZ.	43000 109100	19,806	33,105	60.4	37.9	1.7
THE QUAKER OATS COMPANY	GRANOLA DIPPS PEANUT BUTTER 6 OZ.	30000 062800	23,821	32,860	58.0	20.5	21.5
GENERAL MILLS, INC.	FIBER ONE 13.5 OZ.	16000 656000	28,607	32,448	49.6	21.9	28.6
QUAKER OATS COMPANY	CINNAMON LIFE CEREAL 20 OZ.	30000 060800	16,665	32,110	44.8	35.8	19.5
RALSTON PURINA COMPANY	RALSTON BRAN CHEX 14 OZ.	17800 191010	28,739	32,100	58.5	24.2	17.4
KELLOGG'S	KELLOGG'S MARSHMALLOW KRISPIES 11.4 OZ.	38000 033000	20,249	31,726	39.8	34.0	26.1
GENERAL MILLS, INC.	CEREAL ROCKY ROAD 12.5 OZ.	16000 690600	19,766	31,689	64.1	13.6	22.3
RALSTON PURINA COMPANY	RAINBOW BRITE CEREAL 11 OZ.	17800 128810	20,380	31,555	34.2	53.7	12.1
CARNATION COMPANY	INSTANT BREAKFAST CHOCOLATE 10 ENVELOPE	50000 530320	12,545	31,552	68.2	22.4	9.4
GENERAL MILLS GROC PROD DIV	FRUIT BAR GRAPE 4.8 OZ.	16000 492100	22,430	31,192	69.9	22.4	7.7
CARNATION COMPANY	BREAKFAST BAR CHOCOLATE CHIP 6 ENVELOPE	50000 510420	21,482	31,056	47.9	35.0	17.0
QUAKER OATS COMPANY	CHEWY GRANOLA BARS PEANUT BUTTER 8 OZ.	30000 068300	20,300	29,949	54.1	25.5	20.4
RALSTON PURINA COMPANY	G.I. JOE ACTION STARS 11 OZ.	17800 150080	29,286	29,684	42.6	50.0	7.4
KELLOGG'S	KELLOGG'S PRODUCT 19 15.4 OZ.	38000 019220	14,908	28,642	35.1	44.9	20.1
QUAKER	INSTANT GRITS POUCH 9.6 OZ.	30000 041400	28,618	28,484	40.9	38.4	20.7
GENERAL MILLS GROC PROD DIV	FRUIT ROLL-UPS CHERRY 4.0 OZ.	16000 480800	20,734	28,439	72.9	17.3	9.8
RALSTON PURINA COMPANY	SUGAR FROSTED FLAKES 20 OZ.	17800 300700	21,143	27,572	52.4	47.6	0.0
GENERAL MILLS GROC PROD DIV	FRUIT BAR CHERRY 4.8 OZ.	16000 492000	18,268	25,726	90.8	0.0	9.2
KELLOGG'S	KELLOGG'S ALL BRAN 18.3 OZ.	38000 014110	16,055	24,792	53.6	41.1	5.3
RALSTON PURINA COMPANY	RALSTON CRISP CRUNCH 16 OZ.	17800 293240	17,812	24,162	40.4	59.6	0.0
CARNATION COMPANY	INSTANT BREAKFAST CHOCOLATE 6 ENVELOPE	50000 550320	15,230	23,195	44.3	20.4	35.3
KELLOGG'S	KELLOGG'S JUMBO 18 INDV.	38000 050300	8,581	23,148	56.1	25.1	18.8
NABISCO BRANDS, GROCERY DIV	SHRED.WHT.TOASTED WHEAT & RAISINS,14 OZ	13130 000600	16,077	23,145	50.4	40.6	9.0
QUAKER OATS COMPANY	PUFFED WHEAT 6 OZ.	30000 064100	22,209	22,657	49.7	37.3	13.0
NABISCO BRANDS, BISCUIT	TOASTETTES-APPLE 9-3/4 OZ.	44000 005540	27,870	22,007	32.6	51.5	15.9
KELLOGG'S	KELLOG'S FRST. POP-TARTS RASPBERRY 11 OZ	38000 316000	24,026	21,881	56.0	12.5	31.5
CARNATION COMPANY	BREAKFAST BAR P. BUTTER CRUNCH 6 ENVELOP	50000 510520	14,747	21,297	42.1	36.9	21.0
GENERAL MILLS GROC PROD DIV	BUC-WHEATS 17.0 OZ.	16000 676200	10,457	21,270	56.0	29.0	15.1
THE QUAKER OATS COMPANY	GRANOLA DIPPS RAISIN & ALMOND 6 OZ.	30000 062600	15,598	21,213	53.0	34.6	12.4
CARNATION COMPANY	BREAKFAST BAR CHOC. CRUNCH 6 ENVELOPE	50000 510220	15,119	20,990	40.5	42.6	16.9
KELLOGG'S	KELLOGG'S.RICE KRISPIE BAR CHOC. CHP. 8 OZ	38000 350000	15,524	20,775	0.0	55.0	45.0
QUAKER OATS COMPANY	QUAKER OATS REGULAR, 42 OZ.	30000 010400	11,778	20,697	61.5	19.9	18.6
KELLOGG'S	KELLOGG'S O.J.'S 12.5 OZ.	38000 030000	12,555	20,667	36.1	44.9	19.0
QUAKER OATS COMPANY	HOMINY GRITS QUICK 1.5 LBS.	30000 041700	29,236	20,646	45.3	37.1	17.6
GENERAL MILLS, INC.	RAISIN NUT BRAN 20.0 OZ.	16000 659900	9,893	20,144	38.9	23.0	38.0
NABISCO BRANDS, BISCUIT	TOASTETTES-CHERRY 9-3/4 OZ.	44000 005530	25,536	20,075	41.7	39.2	19.1
THE QUAKER OATS COMPANY	GRANOLA DIPPS-VARIETY PACK	30000 075300	14,460	20,074	42.1	9.8	48.2
KELLOGG'S	KELLOGG'S FROSTED KRISPIES 14 OZ.	38000 003110	11,578	20,053	50.8	35.7	13.5
INTERNATIONAL MULTIFOODS CORP.	WHEAT GERM CEREAL 12 OZ.	24800 001190	19,672	19,990	34.4	43.8	21.9
NABISCO BRANDS, GROCERY DIV	MIX 'N EAT, APPLE 'N CINNAMON, 10 OZ.	13130 006310	15,957	19,914	42.2	47.5	10.3
THE QUAKER OATS COMPANY	GRANOLA DIPPS CARMEL NUT, 6 OZ.	30000 078900	13,911	19,432	64.1	8.3	27.6
CARNATION COMPANY	BREAK. BAR P. BTR. W/CHOC. CHIP 6 ENV.	50000 510320	13,908	19,404	51.9	33.7	14.4
THE QUAKER OATS COMPANY	GRANOLA DIPPS MINT CHOC. CHIP, 6 OZ.	30000 079100	13,628	19,091	34.2	42.1	23.7
CARNATION COMPANY	INSTANT BRKFST. NO SUGAR CHOC. 8 ENV.	50000 540420	7,919	18,953	51.0	38.6	10.3
KELLOGG'S	KELLG'S. RICE KRISPIE BAR RAISIN 8 OZ.	38000 352000	14,387	18,894	67.2	22.2	10.5
KELLOGG'S	KELLOGG'S FROSTED FLAKES 15 OZ.	38000 015100	10,737	18,671	5.1	0.0	94.9
RALSTON PURINA COMPANY	S'MORES CHOCOLATE CHIP 8 OZ.	38100 140090	15,283	18,661	56.3	27.1	16.6
RALSTON PURINA COMPANY	SUN FLAKES WHEAT & RICE 15 OZ.	17800 122050	12,859	18,572	63.6	36.2	0.3
RALSTON PURINA COMPANY	GHOSTBUSTERS 11 OZ.	17800 160100	12,877	18,495	49.7	50.3	0.0
QUAKER OATS COMPANY	100% NATURAL CEREAL 32 OZ. W/RAIS.&DATES	30000 067200	6,283	18,398	62.1	0.0	37.9
QUAKER OATS COMPANY	100% NATURAL CEREAL 32 OZ.	30000 067000	6,311	18,308	48.9	10.2	40.8

CEREALS — June 1986 Sales for All U.S. Commissaries

COMPANY	PRODUCT	UPC NUMBER	AMOUNT OF UNITS	U.S. DOLLARS	% OF AIR FORCE	% OF ARMY	% OF NAVY
QUAKER OATS COMPANY	INSTANT OATMEAL RAISIN,DATES,WLNTS 13 OZ	30000 012400	11,319	18,128	37.0	55.2	7.8
QUAKER OATS COMPANY	CHEWY GRAN. BARS P. BTR.&CHOC.CHIP.8 OZ.	30000 067900	12,518	17,984	63.1	25.5	11.4
QUAKER OATS COMPANY	CHEWY GRAN. BARS CHUNKY NUT&RAISIN 8 OZ.	30000 068500	12,214	17,602	72.6	0.0	27.4
GENERAL MILLS, INC.	WHEATIES 12 OZ.	16000 661100	14,164	17,485	76.7	0.0	23.3
GENERAL MILLS, INC.	DANDY BARS MILK CHOC. 6.5 OZ.	16000 492400	14,422	17,384	63.2	22.6	14.2
KELLOGG'S	FROSTED MINI-WHEATS SUGAR FROST. 20.4 OZ	38000 027270	8,605	17,199	90.0	0.0	10.0
NABISCO BRANDS, GROCERY DIV	CREAM OF WHEAT, INSTANT 28 OZ.	13130 006220	11,355	17,034	49.9	39.6	10.4
GENERAL FOODS CORPORATION	SMURF-BERRY CRUNCH 11 OZ.	43000 109200	10,457	16,689	38.2	53.9	7.9
RALSTON PURINA COMPANY	CORN FLAKES 18 OZ.	17800 300410	20,893	16,681	55.8	34.0	10.2
GENERAL MILLS, INC.	FRUIT BAR TROPICAL FRUIT 4.8 OZ.	16000 491800	11,560	16,509	77.7	5.6	16.8
NABISCO BRANDS, BISCUIT	TOASTETTES-BLUEBERRY 9-3/4 OZ.	44000 005550	21,089	16,507	49.0	27.1	24.0
QUAKER OATS COMPANY	PUFFED RICE 7 OZ.	30000 061900	16,701	16,495	58.9	31.9	9.2
CARNATION COMPANY	INSTANT BREAKFAST VARIETY PK. 10 ENVELOP	50000 530520	6,461	16,145	53.1	31.9	15.0
GENERAL MILLS GROC PROD DIV	FRUIT ROLL-UPS ORANGE 4.0 OZ.	16000 480400	11,993	16,071	80.8	1.2	18.0
KELLOGG'S	KELLG'S.FRST. POP-TARTS CHOC.CREME 11 OZ	38000 315000	17,131	15,578	65.9	23.5	10.6
THE QUAKER OATS COMPANY	PNUT.BTER WHIPPS GRAN. BARS C.CHP. 6 OZ.	30000 079200	17,163	15,550	70.2	15.3	14.6
NABISCO BRANDS, GROCERY DIV	TEAM FLAKES, 13 OZ.	13130 001480	11,034	15,414	58.4	25.6	16.1
THE QUAKER OATS COMPANY	GRANOLA DIPPS HONEY & OATS 6 OZ.	30000 067100	11,194	15,253	50.4	35.1	14.5
NABISCO BRANDS, GROCERY DIV	MIX 'N EAT, OUR ORIGINAL, 10 OZ.	13130 006250	12,144	15,232	46.9	35.0	18.1
GENERAL MILLS GROC PROD DIV	GRANOLA BAR CINNAMON 10.0 OZ.	16000 486100	11,463	15,034	26.3	68.1	5.5
RALSTON PURINA COMPANY	RICE CHEX 17.5 OZ.	17800 182540	9,009	14,905	51.9	43.4	4.8
GENERAL FOODS CORPORATION	HONEYCOMB 10 OZ.	43000 111400	10,117	14,771	21.3	14.4	64.2
KELLOGG'S	KELLOGG'S POP-TARTS BLUEBERRY 11 OZ.	38000 300000	16,043	14,717	74.2	8.9	16.9
QUAKER OATS COMPANY	CHEWY GRANOLA BARS HONEY & OATS 8 OZ.	30000 068800	9,633	14,341	46.0	36.4	17.6
GENERAL MILLS, INC.	DANDY BARS CHOC. ALMOND 6.5 OZ.	16000 492700	11,744	14,157	60.1	21.1	18.9
GENERAL MILLS GROC PROD DIV	TOTAL 18.0 OZ.	16000 658900	5,688	13,937	100.0	0.0	0.0
THE QUAKER OATS COMPANY	HOMINY GRITS QUICK 1.5 LBS.	30000 041800	19,372	13,646	48.2	48.1	3.7
GENERAL MILLS, INC.	NATURE VALLEY GRANOLA FRUIT & NUT 16 OZ	16000 669400	7,881	13,538	50.7	49.3	0.0
KELLOGG'S	KELLOGG S SNACK-PAK 12 CADDIES 6 IND.	38000 052300	11,083	12,907	42.6	15.0	42.4
RALSTON PURINA COMPANY	TASTEEOS 15 OZ.	17800 198000	13,159	12,715	33.6	66.4	0.0
GENERAL MILLS, INC.	PEANUT BUTTER BOPPERS HONEY CRSP. 6OZ	16000 498800	9,740	12,606	74.1	9.5	16.4
THE QUAKER OATS COMPANY	PNUT.BTR.WHIPPS GRAN.BARS CKY.PNT. 6 OZ.	30000 079300	13,391	12,308	68.8	13.6	17.6
RALSTON PURINA COMPANY	S'MORES PEANUT BUTTER & CHOC. CHIP 8 OZ.	38100 140410	9,901	12,258	70.9	19.6	9.5
QUAKER OATS COMPANY	INSTANT OATMEAL RAISINS & SPICE 15 OZ.	30000 013200	7,529	12,092	61.8	23.3	14.9
RALSTON PURINA COMPANY	RALSTON HONEY & NUT TASTEEO 14 OZ.	17800 198260	9,780	12,001	50.8	49.2	0.0
KELLOGG'S	KELLOGG'S FROST. POP-TARTS GRAPE 11 OZ.	38000 314000	12,771	11,813	55.9	16.2	27.9
GENERAL MILLS, INC.	CEREAL BRAN MUFFIN CRISP 14 OZ.	16000 651000	9,122	11,807	58.1	14.2	27.8
RALSTON PURINA COMPANY	RALSTON CRISPY RICE 13 OZ.	17800 292560	11,724	11,744	35.8	64.2	0.0
CARNATION COMPANY	INSTANT BREAKFAST CHOC. MALT 10 ENVELOPE	50000 530420	4,579	11,355	51.5	33.9	14.6
GENERAL MILLS, INC.	DANDY BARS DARK CHOC. 6.5 OZ.	16000 492500	9,323	11,296	54.2	27.6	18.2
GENERAL MILLS GROC PROD DIV	COUNT CHOCULA 12.0 OZ.	16000 686400	6,326	11,217	77.8	22.2	0.0
QUAKER OATS COMPANY	HOMINY GRITS INSTANT 18 OZ.	30000 040500	9,139	11,182	38.0	62.0	0.0
THE QUAKER OATS COMPANY	QUICK COOK. OATS APPLES/RAIS/WLNTS.13OZ.	30000 011200	6,672	10,749	58.6	26.7	14.7
THE QUAKER OATS COMPANY	QUICK COOKING OATS APPLE/RAIS/SPICE 16OZ	30000 010500	7,112	10,694	65.2	27.4	7.4
MALT O MEAL COMPANY	HOT CEREAL UNCOOKED QUICK 28 OZ.	42400 001050	9,526	10,614	70.4	19.2	10.4
QUAKER OATS COMPANY	CHEWY GRAN. BARS CHO.,GRAHAM&MARSH. 8 OZ	30000 076400	7,289	10,424	83.8	14.1	2.1
PET INC., GROCERY GROUP	HEARTLAND NATURAL CEREAL RAISIN 16 OZ.	46000 090020	7,662	10,393	47.8	52.2	0.0
NABISCO BRANDS, GROCERY DIV	NABISCO SHREDDED WHEAT, 10 OZ.	13130 000020	9,255	9,902	45.2	0.0	54.8
QUAKER OATS COMPANY	CINNAMON LIFE CEREAL 15 OZ.	30000 063200	5,973	9,844	47.3	33.8	18.9
GENERAL MILLS, INC.	CEREAL CIRCUS FUN 12 OZ.	16000 685100	5,910	9,758	22.9	62.1	15.0
CARNATION COMPANY	INSTANT BREAKFAST VANILLA 6 ENVELOPE	50000 553020	6,405	9,740	37.3	62.7	0.0
QUAKER OATS COMPANY	INSTANT OATMEAL CINN. & SPICE 16.25 OZ.	30000 013500	6,078	9,540	74.6	22.9	2.5
RALSTON PURINA COMPANY	40% BRAN FLAKES 20 OZ.	17800 260000	9,156	9,415	100.0	0.0	0.0
NABISCO BRANDS, BISCUIT	TOASTETTES-STRAWBERRY 9.75 OZ.	44000 005520	12,049	9,401	0.0	57.7	42.3
THE QUAKER OATS COMPANY	PNT.BTR.WHIPPS GRAN.BR.MARSH.C CHIP 6 OZ	30000 079400	10,353	9,269	65.7	20.3	14.0
GENERAL MILLS GROC PROD DIV	FRUIT ROLL-UPS APPLE 4.0 OZ.	16000 480900	6,849	9,215	100.0	0.0	0.0
NABISCO BRANDS, GROCERY DIV	CREAM OF WHEAT REGULAR, 28 OZ.	13130 006020	6,091	9,071	43.2	55.9	0.9
RALSTON PURINA COMPANY	RALSTON OATS, QUICK 42 OZ.	17800 620220	8,235	8,871	91.0	9.0	0.0
GENERAL MILLS GROC PROD DIV	CORN TOTAL 10 OZ.	16000 659600	5,791	8,860	51.5	48.5	0.0
KELLOGG'S	KELLOGG'S NUTRI-GRAIN CORN 12 OZ.	38000 102010	6,470	8,635	72.0	28.0	0.0
RALSTON PURINA COMPANY	COOKIE CRISP CHOC. CHIP 11 OZ.	17800 189820	6,130	8,583	71.7	28.3	0.0
CARNATION COMPANY	INSTANT BREAKFAST VARIETY PK. 6 ENVELOPE	50000 554020	5,509	8,516	77.3	0.0	22.7
KELLOGG'S	KELLOGG'S BRAN FLAKES 20 OZ.	38000 006200	5,022	8,506	84.6	0.0	15.4
KELLOGG'S	KELLOGG'S POP-TARTS CINNAMON 10.5 OZ.	38000 301000	9,178	8,490	46.7	34.4	18.9
PET INC., GROCERY GROUP	HEARTLAND NATURAL CEREAL PLAIN 16 OZ.	46000 090010	6,040	8,398	56.9	40.4	2.8
THE QUAKER OATS COMPANY	GRANOLA DIPPS ROCKY ROAD, 6 OZ.	30000 079000	6,216	8,393	66.7	15.6	17.7
GENERAL MILLS GROC PROD DIV	NATURE VLY.CWY.GRAN.BAR CHOC.CHP.8 OZ	16000 475900	5,280	8,354	36.5	49.2	14.3
PILLSBURY	TOASTER STRUDEL BLUEBERRY 6 PACK	18000 655300	7,627	8,349	4.2	95.8	0.0
RALSTON PURINA COMPANY	CABBAGE PATCH KIDS CEREAL 10 OZ.	17800 154640	6,002	8,333	42.4	34.4	23.2
RALSTON PURINA COMPANY	S'MORES BARS CHOC. FUDGE 8 OZ.	38100 140540	7,248	8,312	53.1	30.9	15.9
GENERAL MILLS GROC PROD DIV	GRANOLA BAR PEANUT BUTTER 10.0 OZ.	16000 484000	6,216	8,306	70.0	30.0	0.0
GENERAL MILLS GROC PROD DIV	FRUIT ROLL-UPS APRICOT 4.0 OZ.	16000 481000	6,100	8,277	100.0	0.0	0.0
QUAKER OATS COMPANY	MR. T 9.5 OZ.	30000 063600	5,456	8,182	13.0	84.3	2.7
RALSTON PURINA COMPANY	INST.HOT SUNMAID APL.RAIS.CIN. 14.5 OZ.	17800 129330	6,166	8,121	42.9	46.3	10.8
PILLSBURY	TOASTER STRUDEL STRAWBERRY 6 PACK	18000 655200	7,374	8,084	5.8	94.2	0.0
RALSTON PURINA COMPANY	S'MORES PEANUT BUTTER 8 OZ.	38100 140120	6,688	7,865	54.6	32.0	13.5
RALSTON PURINA COMPANY	S'MORES CARAMEL NUT 8 OZ.	38100 140250	6,730	7,830	75.0	19.0	6.0
INTERNATIONAL MULTIFOODS CORP.	SUN COUNTRY GRANOLA, ALMOND 1 LB.	24800 001680	6,448	7,735	24.9	26.7	48.4
GENERAL MILLS GROC PROD DIV	NATURE VLY.CWY.GRAN.BAR.P.BTR. 8.25 OZ	16000 475500	5,695	7,606	32.8	42.2	25.0
QUAKER OATS COMPANY	RAISIN LIFE CEREAL 15 OZ.	30000 063300	4,607	7,563	59.1	35.8	5.1

CEREALS — June 1986 Sales for All U.S. Commissaries

COMPANY	PRODUCT	UPC NUMBER	AMOUNT OF UNITS	U.S. DOLLARS	% OF AIR FORCE	% OF ARMY	% OF NAVY
GENERAL MILLS, INC.	DANDY BARS PEANUT BUTTER 6.5 OZ.	16000 492600	6,222	7,547	66.8	12.6	20.6
KELLOGG'S	KELLOGG'S RAISIN BRAN 15 OZ.	38000 008100	4,689	7,503	43.8	50.8	5.4
NABISCO BRANDS, GROCERY DIV	MIX 'N EAT, BROWN SUGAR CINNAMON, 10 OZ.	13130 006350	6,002	7,320	64.0	10.5	25.4
THE QUAKER OATS COMPANY	PNT.BTR.WHIPPS GRAN.BRS.BANANA NUT 6 OZ.	30000 079500	7,500	7,111	66.4	21.3	12.3
GENERAL MILLS GROC PROD DIV	HONEY NUT CHEERIOS 20.0 OZ.	16000 667500	2,957	7,066	100.0	0.0	0.0
THE QUAKER OATS COMPANY	QUICK COOKING OATS RAISIN/CINN. 16.5 OZ	30000 010600	5,005	7,061	63.5	26.6	9.9
CARNATION COMPANY	INSTANT BREAKFAST CHOC. MALT 6 ENVELOPE	50000 580320	4,572	7,001	41.8	58.2	0.0
NABISCO BRANDS, INC.	MIX 'N EAT STRAWBERRY 10 OZ.	13130 006560	5,680	7,001	53.8	46.0	0.2
KELLOGG'S	KELLOGG'S FROOT LOOPS 11 OZ.	38000 017100	3,817	6,793	0.0	0.0	100.0
CARNATION COMPANY	INSTANT BREAK. NO SUGAR VARIETY PK.8 ENV	50000 540620	2,802	6,745	44.9	39.9	15.2
MALT O MEAL COMPANY	TOASTED OAT CEREAL 10 OZ.	42400 003100	8,788	6,723	55.7	18.6	25.7
KELLOGG'S	KELLOGG'S CORN FLAKES 12 OZ.	38000 001100	6,320	6,447	92.1	0.0	7.9
QUAKER OATS COMPANY	100% NATURAL CEREAL W/APPLE & CINN. 15 OZ.	30000 069700	4,368	6,322	47.4	52.6	0.0
KELLOGG'S	KELLG'S. POP-TARTS P.BTR. & JELLY 11 OZ.	38000 319000	7,101	6,205	69.7	20.8	9.6
GENERAL MILLS GROC PROD DIV	NATURE VALLEY GRAN.TST. OATS 16.0 OZ.	16000 669000	3,679	6,042	100.0	0.0	0.0
PILLSBURY	TOASTER STRUDEL CINNAMON 6 PACK	18000 655000	5,520	6,016	0.0	100.0	0.0
PILLSBURY	TOASTER STRUDEL RASPBERRY 6 PACK	18000 655100	5,510	6,006	0.0	100.0	0.0
NABISCO BRANDS, GROCERY DIV	MIX 'N EAT, MAPLE & BROWN SUGAR, 10 OZ.	13130 006530	4,950	5,949	74.6	24.1	1.2
CARNATION COMPANY	INSTANT BRKFST. NO SUGR.CHOC. MALT 8 ENV	50000 540520	2,543	5,931	53.6	23.6	22.8
GENERAL FOODS CORPORATION	RAISIN GRAPE NUTS 16 OZ.	43000 106100	4,168	5,862	37.8	62.2	0.0
KELLOGG'S	KELLOGG'S POP-TARTS CHERRY 11 OZ.	38000 305000	6,188	5,664	68.7	9.4	21.9
CARNATION COMPANY	INSTANT BREAKFAST NO SUGAR VARIETY PACK	50000 540820	2,454	5,636	0.0	65.6	34.4
INTERNATIONAL MULTIFOODS CORP.	WHEAT GERM CEREAL 20 OZ.	24800 001270	3,791	5,627	55.9	32.0	12.1
QUAKER OATS	GRITS INSTANT BACON FLAV. POUCH 10 OZ.	30000 040400	5,636	5,619	39.6	38.1	22.2
CARNATION COMPANY	QUICK GRITS 2.5 LB.	50000 291650	4,352	5,613	44.6	55.4	0.0
RALSTON PURINA COMPANY	S'MORES BARS CHOC. RAISIN 8 OZ.	38100 140670	4,855	5,607	64.6	24.6	10.8
KELLOGG'S	KELLG'S. COCOA KRISPIES CHOC. CHP. 8 OZ.	38000 353000	3,960	5,416	0.0	69.3	30.7
RALSTON PURINA COMPANY	RALSTON WHEAT CHEX 22 OZ.	17800 152860	3,371	5,318	100.0	0.0	0.0
QUAKER OATS COMPANY	CHEWY GRAN. BARS RAIS.& CINN. 8 OZ.	30000 068100	3,442	4,999	0.0	70.6	29.4
THE QUAKER OATS COMPANY	INSTANT GRITS POUCH PAK HAM 10 OZ.	30000 041000	4,919	4,954	40.2	39.8	20.1
GENERAL MILLS GROC PROD DIV	NATURE VALLEY GRAN.CINN.&RAIS 16.0 OZ	16000 669200	2,922	4,832	100.0	0.0	0.0
QUAKER OATS COMPANY	QUAKER OAT BRAN CEREAL 16 OZ.	30000 070600	4,091	4,822	66.2	19.6	14.2
GENERAL MILLS, INC.	PEANUT BUTTER BOPPERS FUDGE CHIP 6 OZ	16000 498600	3,579	4,814	0.0	35.9	64.1
THE QUAKER OATS COMPANY	OH!S CEREAL HONEY GRAHAM 12 OZ.	30000 078400	3,410	4,794	14.6	85.4	0.0
NABISCO BRANDS, BISCUIT	FROST.TOASTETTES-BRN.SGR. & CINN. 9.75 OZ.	44000 005580	5,969	4,776	51.8	0.0	48.2
PILLSBURY	INSTANT BREAK.VARIETY 10 PACK 12.75 OZ.	18000 785000	2,136	4,763	32.8	0.0	67.2
PET INC., GROCERY GROUP	HEARTLAND NATURAL CEREAL COCONUT 16 OZ.	46000 090030	3,514	4,645	66.7	33.3	0.0
INTERNATIONAL MULTIFOODS CORP.	HONEY CRUNCH WHEAT GERM CEREAL 10 OZ.	24800 001350	4,798	4,645	68.1	23.3	8.6
KELLOGG'S	KELLOGG'S CORN FLAKES 7 OZ.	38000 001010	7,077	4,601	100.0	0.0	0.0
GENERAL MILLS, INC.	FRUIT ROLL-UPS RASPBERRY 4 OZ.	16000 479600	3,260	4,469	0.0	27.8	72.2
GENERAL MILLS GROC PROD DIV	GRANOLA BAR COCONUT 10.0 OZ.	16000 486200	3,227	4,404	44.3	30.0	25.7
QUAKER OATS COMPANY	PUFFED WHEAT 4 OZ.	30000 063700	5,419	4,393	12.3	59.3	28.4
KELLOGG'S	KELLOGG'S BRAN BUDS 17.7 OZ.	38000 013020	3,077	4,389	30.3	69.7	0.0
GENERAL MILLS GROC PROD DIV	FRUIT BAR ORANGE PINEAPPLE 4.8 OZ.	16000 492200	3,118	4,336	0.0	54.2	45.8
GENERAL MILLS GROC PROD DIV	NATR.VLY.CWY.GRN.BAR P.BTR.C.CHP 8 OZ	16000 476700	3,105	4,289	34.2	36.4	29.4
KELLOGG'S	KELLOGG'S RAISINS, RICE & RYE 18 OZ.	38000 023100	2,003	4,269	4.0	63.6	32.4
MARTHA WHITE FOODS, INC.	"JIM DANDY" QUICK GRITS 5 LB.	13300 122010	3,058	4,250	0.0	79.8	20.2
MALT-O-MEAL	PUFFED WHEAT 6 OZ.	42400 002200	9,441	4,221	73.8	10.8	15.4
THE QUAKER OATS COMPANY	OH!S CEREAL CRUNCHY NUT 12.75 OZ.	30000 078300	2,969	4,152	16.8	83.2	0.0
GENERAL MILLS	RAISIN NUT BRAN CEREAL 14 OZ.	16000 659800	2,645	4,117	100.0	0.0	0.0
GENERAL FOODS CORPORATION	POST TOASTIES FROSTED FLAKES 20 OZ.	43000 107500	2,386	4,063	50.1	49.9	0.0
NABISCO BRANDS, GROCERY DIV	SPOON SIZE SHREDDED WHEAT, 12 OZ.	13130 000530	3,144	4,056	100.0	0.0	0.0
GENERAL FOODS CORPORATION	GRAPE NUTS FLAKES 12 OZ.	43000 109330	3,199	3,966	17.0	18.8	64.2
QUAKER OATS COMPANY	CAP'N CRUNCH'S CHOCO CRUNCH 12 OZ.	30000 065500	2,608	3,362	98.4	0.0	1.6
RALSTON PURINA COMPANY	INST. HOT SUN-MAID RAISIN SPICE 15.5 OZ.	17800 129620	3,082	3,829	32.4	53.9	13.7
PILLSBURY COMPANY	MILK BREAK MILK BAR CHOC. 12/9 OZ.	18000 769300	3,371	3,826	38.4	14.2	47.4
RALSTON PURINA COMPANY	INST. HOT SUN-MAID DATE,RAIS.WLNT.15 OZ.	17800 129750	2,970	3,823	44.9	38.6	16.5
CARNATION COMPANY	INSTANT BREAKFAST STRAWBERRY 6 ENVELOPE	50000 552520	2,733	3,758	78.5	21.5	0.0
SUNSHINE BISCUITS, INC.	SHREDDED WHEAT 10 OZ.	24100 701590	4,323	3,728	56.1	36.5	7.4
GENERAL MILLS, INC.	PEANUT BTR. BOPPERS PNT. CRUNCH 6 OZ.	16000 498700	2,664	3,566	0.0	36.0	64.0
NABISCO BRANDS, BISCUIT	FROST. TOASTETTES-STRAWBERRY 9-3/4 OZ.	44000 005560	4,392	3,562	63.1	1.8	35.1
SUNSHINE BISCUITS, INC.	SHREDDED WHEAT BITE SIZE 12 OZ.	24100 701600	3,506	3,539	38.9	54.0	7.2
MERICO	TOASTER PASTRY APPLE FROSTED 11 OZ.	33700 471540	5,810	3,303	53.8	46.2	0.0
GENERAL MILLS GROC PROD DIV	NATURE VLY. CWY.GRAN.BAR APPLE 8 OZ.	16000 475800	2,394	3,228	49.5	21.6	28.9
MALT O MEAL COMPANY	HOT CEREAL CHOC. FLAVORED 28 OZ.	42400 001360	2,664	3,153	22.6	57.1	20.4
GENERAL MILLS, INC.	NTR.VLY.CWY.GRAN.BAR CHOC./CHOC.CHP.8 OZ	16000 476600	2,323	3,144	0.0	36.0	64.0
INTERNATIONAL MULTIFOODS CORP.	SUN COUNTRY GRANOLA, RAISIN & DATE 1 LB.	24800 001560	2,690	3,010	28.9	71.1	0.0
KELLOGG'S	KELLOGG'S RAISIN BRAN 11 OZ.	38000 008000	2,381	2,977	100.0	0.0	0.0
QUAKER OATS COMPANY	PUFFED RICE 5 OZ.	30000 061300	3,488	2,857	9.5	63.7	26.8
THE QUAKER OATS COMPANY	CHEWY GRANOLA BARS CHOC. MINT CHIP 8 OZ.	30000 079600	1,886	2,793	32.1	5.5	62.4
QUAKER OATS COMPANY	HOMINY GRITS REGULAR 1 1/2 LBS.	30000 040900	3,855	2,737	10.5	89.5	0.0
GENERAL MILLS GROC PROD DIV	NATURE VLY.CWY.GRAN.BAR RAISIN 8 OZ.	16000 475600	1,847	2,548	46.1	53.9	0.0
PILLSBURY COMPANY	INSTANT BREAKFAST 10 PK. CHOC. 13 OZ.	18000 790800	1,133	2,521	46.8	45.1	8.1
MERICO	TOASTER PASTRY CINNAMON FROSTED 11 OZ.	33700 471550	4,366	2,516	52.2	47.8	0.0
MERICO	TOASTER PASTRY CHERRY FROSTED 11 OZ.	33700 471560	4,474	2,464	100.0	0.0	0.0
NABISCO BRANDS, GROCERY DIV	SPOON SIZE SHREDDED WHEAT, 24 OZ.	13130 000500	1,350	2,437	9.2	0.0	90.8
MERICO	TOASTER PASTRY STRAWBERRY FROSTED 11 OZ.	33700 471530	4,259	2,358	100.0	0.0	0.0
MALT O MEAL COMPANY	SUGAR FROSTED WHEAT PUFFS 18 OZ.	42400 004100	1,675	2,348	4.6	0.0	95.4
INTERNATIONAL MULTIFOODS CORP.	SUN COUNTRY GRANOLA, RAISIN 1 LB.	24800 001500	1,973	2,276	44.5	55.5	0.0
THE QUAKER OATS COMPANY	CHEWY GRANOLA BARS BANANA CHO. CHIP 8 OZ	30000 076500	1,484	2,262	11.8	8.8	79.4

CEREALS — June 1986 Sales for All U.S. Commissaries

COMPANY	PRODUCT	UPC NUMBER	AMOUNT OF UNITS	U.S. DOLLARS	% OF AIR FORCE	% OF ARMY	% OF NAVY
NABISCO BRANDS, GROCERY DIV	CREAM OF RICE, 14 OZ.	13130 006980	2,654	2,230	80.3	0.0	19.7
PILLSBURY COMPANY	MILK BREAK MILK BAR P. BUTTER 12/9 OZ.	18000 769200	2,025	2,210	39.6	13.3	47.0
GENERAL FOODS CORPORATION	C.W.POST FAMILY STYLE 15 OZ.	43000 127000	1,336	2,204	100.0	0.0	0.0
GENERAL MILLS GROC PROD DIV	GRANOLA BAR PEANUT 10.0 OZ.	16000 486900	1,449	2,090	55.2	0.0	44.8
GENERAL MILLS, INC.	GRANOLA BAR CHOC. CHIP 9 OZ.	16000 485900	1,486	2,046	99.8	0.0	0.2
PILLSBURY	FIGURINES VANILLA 6.08 OZ.	18000 784600	1,480	1,998	0.0	100.0	0.0
GENERAL MILLS, INC.	GRANOLA BAR CHEWY CARMEL CHOCOLATE CHIP	16000 475700	1,482	1,971	94.2	0.0	5.8
GENERAL MILLS GROC PROD DIV	TRIX 17 OZ.	16000 674000	811	1,961	100.0	0.0	0.0
GENERAL MILLS, INC.	CEREAL FRANKENBERRY 12 OZ.	16000 685600	1,026	1,837	67.8	32.2	0.0
QUAKER OATS COMPANY	INSTANT OATMEAL HONEY & OATS 12.5 OZ.	30000 014700	1,097	1,766	12.6	70.2	17.2
QUAKER OATS COMPANY	HOMINY GRITS QUICK 5 LBS.	30000 043700	1,201	1,762	100.0	0.0	0.0
GENERAL MILLS GROC PROD DIV	TOTAL 8.0 OZ.	16000 658100	1,337	1,751	0.0	0.0	100.0
PILLSBURY	FIGURINES CHOCOLATE 6.08 OZ.	18000 784700	1,290	1,742	0.0	100.0	0.0
QUAKER OATS COMPANY	WHOLE WHT.HOT NAT.CRL. 14 OZ.	30000 072000	2,785	1,727	1.2	98.8	0.0
GENERAL MILLS GROC PROD DIV	GRANOLA CLUSTERS CHOC. CHIP 7.25 OZ.	16000 490900	1,124	1,584	60.0	40.0	0.0
NABISCO BRANDS, BISCUIT	FROST. TOASTETTES-FUDGE 9.75 OZ.	44000 005590	1,821	1,484	66.0	0.0	34.0
RALSTON PURINA COMPANY	INSTANT HOT SUN-MAID MIXED FRUIT 14 OZ.	17800 129590	1,108	1,450	60.6	0.0	39.4
QUAKER OATS COMPANY	HOMINY GRITS QUICK, 2 LBS.	30000 043600	1,772	1,400	100.0	0.0	0.0
NATIONAL OATS COMPANY	3 MINUTE QUICK OATS 19 OZ.	11134 100100	1,607	1,382	100.0	0.0	0.0
GENERAL MILLS GROC PROD DIV	KIX 13.0 OZ.	16000 663700	856	1,354	100.0	0.0	0.0
THE QUAKER OATS COMPANY	INSTANT GRITS POUCH PACK CHEESE 10 OZ.	30000 040700	1,301	1,340	100.0	0.0	0.0
NABISCO BRANDS, GROCERY DIV	CREAM OF WHEAT, QUICK 14 OZ.	13130 006110	1,562	1,304	0.0	0.0	100.0
RALSTON PURINA COMPANY	CRISPY OATMEAL & RAISIN CHEX 16 OZ.	17800 151760	799	1,301	2.3	97.7	0.0
KELLOGG'S	KELLOGG'S REQUEST PACK 12 CADDIES 6 IND.	38000 051300	1,160	1,273	0.0	100.0	0.0
GENERAL MILLS GROC PROD DIV	BOO-BERRY 12.0 OZ.	16000 687500	701	1,256	100.0	0.0	0.0
MARTHA WHITE FOODS, INC.	"JIM DANDY" QUICK GRITS 2 LB.	13300 130010	1,760	1,241	21.3	0.0	78.7
QUAKER	GRITS, QUICK 1.5 LB.	30000 042100	1,794	1,144	0.0	0.0	100.0
MARTHA WHITE	BOIL-IN-BAG QUICK GRITS 10 OZ.	13300 138010	1,550	1,019	20.6	58.1	21.4
NATIONAL OATS	OLD FASHIONED OATS 18 OZ.	11134 105100	1,081	929	100.0	0.0	0.0
RALSTON PURINA COMPANY	INSTANT HOT RALSTON 24 OZ.	17800 100580	773	890	14.8	0.0	85.2
KELLOGG'S	APPLE MINI-WHEATS 16 OZ.	38000 025200	514	883	0.7	99.3	0.0
MARTHA WHITE	"DIXIE LILY" QUICK GRITS 1.5 LB. BAG	13300 125390	1,635	868	83.8	0.0	16.1
CARNATION COMPANY	INSTANT BREAKFAST VANILLA 10 ENVELOPE	50000 530620	368	851	100.0	0.0	0.0
RALSTON PURINA COMPANY	INSTANT HOT SUN-MAID RAISIN NUT 14.5 OZ.	17800 129460	713	851	43.9	0.0	56.1
GENERAL FOODS	POST FRUIT AND FIBER 5 OZ. BOX	43000 104600	2,145	793	100.0	0.0	0.0
QUAKER OATS COMPANY	CORN BRAN 12 OZ.	30000 068700	571	772	100.0	0.0	0.0
MARTHA WHITE	"DIXIE LILY" QUICK GRITS 1 LB. BOX	13300 120390	1,533	736	76.5	0.0	23.5
MERICO	TOASTER PASTRY CHOCOLATE FROSTED 11 OZ.	33700 471580	1,299	733	100.0	0.0	0.0
MERICO	TOASTER PASTRY, GRAPE FROSTED 11 OZ.	33700 471510	1,130	712	0.0	100.0	0.0
PILLSBURY COMPANY	INSTANT BREAKFAST CHOCOLATE MALT 10 PK.	18000 785100	350	711	100.0	0.0	0.0
PILLSBURY COMPANY	INSTANT BREAKFAST 6-PK. VARIETY 7.5 OZ.	18000 784900	483	710	0.0	66.2	33.8
CARNATION COMPANY	SLENDER DIET BARS, CHOC. 4/2 BAR ENVELOP	50000 760120	460	685	0.0	100.0	0.0
MARTHA WHITE FOODS, INC.	"JIM DANDY" QUICK GRITS 1 LB.	13300 116010	1,288	618	0.0	0.0	100.0
KELLOGG'S	KELLOGG'S RICE KRISPIES 10 OZ.	38000 005100	481	614	25.1	0.0	74.9
GENERAL MILLS GROC PROD DIV	WHEAT HEARTS 28.0 OZ.	16000 485700	485	595	100.0	0.0	0.0
GENERAL MILLS GROC PROD DIV	GRANOLA CLUSTERS CARAMEL 7.25 OZ.	16000 488100	417	590	95.2	4.8	0.0
SOVEX NATURAL FOOD, INC.	FRUIT NUT CEREAL 1 LB.	41648 012320	400	575	0.0	100.0	0.0
GENERAL MILLS GROC PROD DIV	E.T. 14.0 OZ.	16000 692500	309	544	22.4	77.5	0.0
SOVEX NATURAL FOOD, INC.	HONEY ALMOND CEREAL 1 LB.	41648 012120	392	544	2.5	97.5	0.0
NATONAL OATS	3 MINUTE GRITS 20 OZ.	11134 130100	845	541	100.0	0.0	0.0
MARTHA WHITE	"JIM DANDY" QUICK GRITS 1 LB. BOX	13300 121070	1,278	489	100.0	0.0	0.0
RALSTON PURINA	INSTANT OATMEAL APPLES & CINN. 12.5 OZ.	17800 185130	360	433	100.0	0.0	0.0
CARNATION COMPANY	SLENDER DIET BARS VANILLA 4/2 BAR ENVLP.	50000 760420	290	432	0.0	100.0	0.0
QUAKER OATS COMPANY	HOMINY GRITS REGULAR 1.5 LBS.	30000 042000	1,010	354	0.0	100.0	0.0
QUAKER OATS COMPANY	QUAKER QUISP 9 OZ.	30000 063100	236	328	100.0	0.0	0.0
RALSTON PURINA COMPANY	RALSTON OATS, QUICK 18 OZ.	17800 620190	563	306	100.0	0.0	0.0
PILLSBURY COMPANY	MILK BREAK MILK BARS MILK 12/9 OZ.	18000 769000	292	266	6.2	93.8	0.0
RALSTON PURINA COMPANY	SUN-MAID INST.HOT CER. APPLE CINN. 15 OZ	17800 129200	189	245	100.0	0.0	0.0
MARTHA WHITE	"DIXIE LILY" QUICK GRITS 5 LB. BAG	13300 122390	175	243	100.0	0.0	0.0
NABISCO BRANDS, INC.	APPLE FRUIT WHEATS, 15.5 OZ.	13130 010400	154	215	0.0	0.0	100.0
MARTHA WHITE	"DIXIE LILY" REGULAR GRITS 1.5 LB. BAG	13300 123390	343	185	100.0	0.0	0.0
GENERAL FOODS CORPORATION	FORTIFIED OAT FLAKES 12 OZ.	43000 112600	121	177	100.0	0.0	0.0
QUAKER OATS COMPANY	CREAMY WHEAT FARINA 20 OZ.	30000 070500	280	162	0.0	100.0	0.0
RALSTON PURINA	INSTANT OATMEAL PEACHES & CREAM 12.5 OZ.	17800 185260	116	140	100.0	0.0	0.0
RALSTON PURINA COMPANY	COOKIE CRISP CRACKER JACK 11 OZ.	17800 130390	99	138	100.0	0.0	0.0
NABISCO BRANDS, INC.	RAISIN FRUIT WHEATS, 15.5 OZ.	13130 010410	97	135	0.0	0.0	100.0
GENERAL MILLS GROC PROD DIV	GRANOLA CLUSTERS ALMOND 7.25 OZ.	16000 488200	92	129	100.0	0.0	0.0
GENERAL MILLS GROC PROD DIV	GRANOLA CLUSTERS RAISIN 7.25 OZ.	16000 488000	85	124	0.0	0.0	100.0
QUAKER OATS COMPANY	INSTANT OATMEAL BRAN & RAISINS 15 OZ.	30000 014500	76	122	0.0	0.0	100.0
GENERAL MILLS GROC PROD DIV	GRANOLA CLUSTERS CHOCOLATE 7.25 OZ.	16000 490800	81	114	100.0	0.0	0.0
GENERAL MILLS GROC PROD DIV	COUNTRY CORN FLAKES 15.0 OZ.	16000 668100	68	113	100.0	0.0	0.0
QUAKER OATS COMPANY	HALFSIES 16 OZ.	30000 064200	50	93	100.0	0.0	0.0
RALSTON PURINA COMPANY	SUN-MAID HOT CER.DATE,RAIS.,WLNT.16.5 OZ	17800 129040	69	89	100.0	0.0	0.0
RALSTON PURINA COMPANY	GREMLINS 11 OZ.	17800 143000	48	77	3.8	0.0	96.2
GENERAL MILLS GROC PROD DIV	GRANOLA BAR ALMOND 10.0 OZ.	16000 486400	44	67	100.0	0.0	0.0
INTERNATIONAL MULTIFOODS CORP.	TOASTED WHEAT BRAN 12 OZ.	24800 001720	66	58	0.0	0.0	100.0
RALSTON PURINA COMPANY	SUN-MAID INST.HOT CRL.RAIS.SPICE 17 OZ.	17800 129170	42	57	94.6	0.0	5.4
RALSTON PURINA COMPANY	DONKEY KONG JUNIOR 11 OZ.	17800 129910	29	46	100.0	0.0	0.0
QUAKER OATS COMPANY	HOMINY GRITS INSTANT BACON FLAV. 8 OZ.	30000 039400	45	38	100.0	0.0	0.0
NABISCO BRANDS, GROCERY DIV	MIX 'N EAT, RAISINS & SPICE, 12 OZ.	13130 006540	24	23	100.0	0.0	0.0
QUAKER OATS COMPANY	HOMINY GRITS INSTANT 8 OZ.	30000 040600	20	21	100.0	0.0	0.0

Tobacco's New Frontiers: More Savings, Many More Brands

Relying less on advertising and more on promotions, tobacco companies seek out new marketing channels.

By Beverly Jones, Associate Editor

TOBACCO MANUFACTURERS are developing new marketing techniques and new products to capture shares of the smoldering cigarette market.

The increasing popularity of on-carton coupons and the spread of generics point to a new trend: customer savings. Customers are looking to save a buck on their tobacco bills, just as they do with other products.

For many years, tobacco manufacturers didn't worry about prices, because there was a single-tiered pricing system. Now, price has to be reckoned with, and on-carton coupons and economy-value cigarettes have become more potent weapons.

There are more brands than ever, and the trend doesn't appear likely to stop. In 1985, tobacco companies introduced 46 new cigarette products, bringing the total number of styles and brands to 250.

"Proliferation of new products should continue for some time, with many new brands likely to be introduced in the value-price category," Thomas E. Sandefur, president of Brown & Williamson, said in a press release.

John Maxwell, author of the authoritative *Maxwell Report*, told MILITARY MARKET that unit consumption will continue to decline a percentage point or more a year for the next several years.

Generics Increase Their Share

In the past, the cigarette market was relatively stable, but the introduction of generics in 1980 by Liggett & Myers changed that drastically.

When generics were first introduced, other companies in the industry scoffed, predicting an early demise. But they judged too quickly.

Generics, or no-names, have grown significantly over the last several years. In 1982, they had a 1 percent share of the cigarette market; this grew to 4 percent in 1984. By 1985, the generic market, which also includes low-price brands as well as no-name brands, held a 7½ percent share.

"It's just tremendous, when you see a jump like that in a two- to three-year period," said Brown & Williamson spokesman Michael Bateman. "And it's significant when you consider the mature market tobacco holds."

Tobacco analyst Maxwell said the generics market will continue to grow. "I think we'll see a percentage point increase a year," he said.

The introduction of black and whites — as generics are sometimes called — has opened the door to other categories. Marketers have found a new niche, "brand generics."

Also called economy-priced or low-price brands, brand generics are priced between true generics and brand-name cigarettes.

Yet another market segment is private label generics — labels made for specific retailers — 7-Eleven, for example.

Sales are respectable. With a 47.5 percent share of the private label/no-frills market, Liggett & Myers has a corner on this share of the business.

Branded generics like R.J. Reynolds' Doral, and Cambridge, by Philip Morris, fall between brand names and generics. Doral is R.J. Reynolds' fastest-growing brand, with a 1.3 percent market share; Cambridge grabbed an 0.6 percent share in 1985.

Cambridge went national early this year, after a short test of only two months. Philip Morris changed Cambridge from an ultra-low tar to a cigarette with 12 milligrams of tar. The quick test and subsequent tar change were in response to the growth of R.J. Reynolds' Doral.

Both brands were recycled from the brand-name segment, where they were dying, to the brand generic segment, where they are more successful.

Brand generics sell about 60¢ to 75¢ cheaper per carton than generics, but are packaged like a brand name cigarette.

Price is the big attraction, with a secondary appeal to those image-concerned people who worry about toting black-and-white packs.

Lorillard, the only big manufacturer not in the generics business, hasn't entered the market because of "very little profit margin," a company spokeswoman said.

Generics and low-price brands tend to sell well in areas where there are a lot of retired military personnel, industry sources told MILITARY MARKET.

Retired military make up 32 percent of all commissary patrons and watch their money closely, said Ted Costas, manager of military accounts for Philip Morris.

market report

Ban Expands

IN LATE AUGUST OF this year, all TV and radio advertising for smokeless tobacco was banned.

Manufacturers of smokeless tobacco now join the ranks of cigarette manufacturers, who have been banned from the airwaves for many years. The broadcasting ban was decided in Congress and signed into law by President Reagan in February 1986.

Congress also now requires that a warning, like the Surgeon General's warnings on cigarettes, be placed in print advertisements and on smokeless tobacco tins and pouches. The Federal Trade Commission is working on final regulations regarding the warning labels, which will be required on all smokeless products beginning February 1987.

Three different warnings will rotate: "This product may cause oral cancer," "This product may cause gum disease and tooth loss," and "This product is not a safe alternative to cigarettes."

Most smokeless tobacco manufacturers said that they aren't surprised by the regulations. "I think it was expected and not any great surprise," one smokeless tobacco producer told MILITARY MARKET.

The manufacturer, who asked not to be identified, said that he felt the warnings will lose their meaning after awhile. "The public has become so accustomed to these warnings, that they don't pay attention to them anymore and they become worthless," he observed.

Over the last several years, companies have begun to spend less on advertising — partly because of stiff FTC restrictions — and more on promotions and couponing.

"I think it's conceivable that we could see it swing to [a] 80/20 [balance]," said Thomas E. Sandefur Jr., president of Brown & Williamson Tobacco, in a written statement. — B.J.

Up For the 25 Count

Like the name brands, generics and low price brands have entered the 25-count package market.

Sales of the low priced brands and the 25-count packs are indications that customers are seeking greater cost savings.

"Discount 25s will probably move ahead faster than brand name 25s," John Maxwell predicted.

According to Brown and Williamson, 25 counts have captured more than 2 percent of the total $30 billion cigarette market — in less than two years.

R.J. Reynolds started the market for 25s in 1983 with its introduction of Century.

Manufacturers say the new count size was started for consumer convenience. Industry analysts found that people smoked an average 22.5 cigarettes a day.

"We went to the 25s for the convenience for the customer, so they wouldn't have to open a new pack every day," said Philip Morris' Costas.

Marlboro 25 has been out for a year. Philip Morris has extended its 25 counts to Marlboro Lights, Players and Players Light.

"We've had some success with the 25's," said Ralph Gaillard, military accounts manager at R.J. Reynolds.

But, he added, "it's taken the consumer some time to get used to the 25 pack."

American Tobacco has just introduced Pall Mall King Size 25s, a non-filter cigarette. The brand went national about four months ago and is doing "exceptionally well," said C.E. "Speck" Henderson, military sales manager.

Pall Mall is American's No. 1 cigarette for the military, with Lucky Strikes a close second. American Tobacco may come out with more 25-count lines, Henderson said.

More Promotion, Fewer Ads

Now that everyone has jumped on the bandwagon, coupons are the wave of the future. Couponing, relatively new in the tobacco industry, has increased in popularity over the last several years.

Manufacturers have responded by changing their marketing techniques. Many are allocating more money in their marketing budgets for promotion and less for advertising.

The commissary agencies have called for all military-specific couponing to be terminated by Jan. 1, 1987.

Private sector coupons and on-carton coupons will still be allowed, but manufacturers can no longer print on the coupons, *Redeemable at military commissaries or exchanges only.*

Military coupons were started for tracking and control purposes, according to Reynolds' Ralph Gaillard. He said the impact of the new DoD tobacco directive will be minimal. "I don't think it'll have a drastic effect on sales," Gaillard said.

Philip Morris entered the coupon market in October 1985, one of the last manufacturers to catch the couponing craze. "Our brands sell on image, like Marlboro and Benson & Hedges," said Costas.

New Market Segments

Tobacco manufacturers have changed with the times by reshuffling their marketing priorities. The idea now is to find unconquered territory within a dwindling market. For instance, the female smoker is being courted more than ever.

Some brands being test-marketed this year are aimed specifically at the female segment of the market.

Lorillard is testing Newport Slim Lights in Connecticut, and Brown & Williamson is trying out Kim in Tennessee. Both are targeted for the young adult female who wants a long, slim, feminine-looking cigarette.

Ritz, introduced nationally by R.J. Reynolds in 1985, is another example. The company hopes the name of Yves Saint Laurent will appeal the same way Calvin Klein started the national craze for designer jeans.

The Marlboro man is still No. 1 with male and female smokers alike, according to Maxwell. Philip Morris' famous brand captures 23 percent of the total tobacco market.

R.J. Reynolds' Winston is rated No. 2, followed by its Salem, Brown & Williamson's Kool and Philip Morris' Benson & Hedges. Together, the fabulous five account for more than half of the industry's total sales.

Park Avenue Tobacco Co. introduced its 1776 brand to the military in April 1985. The brand is holding its own, a company spokesman told MILITARY MARKET, and it is the "bread

market report

Cigarette Use By Military Personnel Is Greater Than the U.S. Average 1985

	U.S. Average Per Capita Usage*	Military Per Capita Usage**	Military Index
TOTAL U.S.	3,334	—	—
MILITARY ON-BASE			
WORLDWIDE	—	7,679	230
DOMESTIC	—	7,227	217
OVERSEAS	—	9,844	295

Per Capita Cigarette Sales: Military Personnel in the U.S.* Versus Total U.S. Average** 1985 to 1970

Year	Total U.S.**	Military On-Base*	Index
1985	3,334	7,227	217
1984	3,411	7,915	232
1983	3,494	8,200	235
1982	3,746	8,455	226
1981	3,840	8,296	216
1980	3,880	8,120	209
1979	3,900	8,117	208
1978	3,970	8,313	209
1977	4,064	8,200	202
1976	4,092	8,498	208
1975	4,123	8,451	205
1974	4,141	8,402	203
1973	4,148	8,153	196
1972	4,043	7,952	197
1971	4,037	7,889	196
1970	3,985	7,731	194

* Cigarettes per capita — military adults in the United States, ages 18 years or older. On-base sales only. * Cigarettes per capita — U.S. adults, ages 18 years or older.

Research Department: Army Times Publishing Company.

and butter" brand for the company. The company is test-marketing a new mystery brand, but declined to say more.

The 1776 brand was launched as a military exclusive last year. This year it branched into the domestic market.

But the biggest change for 1776 this year was a price increase. The product started in the low-price segment, competing with brands like Doral and Cambridge. Park Avenue recently raised the commissary price to about $4.80 a carton, out of the economy/low-price segment and into a mid-price segment. A Park Avenue spokesman said the increase was in response to increased costs and excise taxes.

Smokeless Market Is Changing

While it occupies only a small part of the tobacco industry, smokeless tobacco manufacturers have gotten a lot of big press lately.

Health officials are now warning that long-time users face higher incidents of oral cancer, although the Smokeless Tobacco Council contends that the research is not conclusive enough to warrant such statements.

"We still don't believe there has been enough scientific evidence," said one manufacturer.

However, "The risk of oral cancer for a long-time user of smokeless tobacco is 50 times that of a non-user," said Tim Hensley of the Office of Smoking in the Department of Health and Human Services.

Legislation which passed Congress this year requires manufacturers to place warning labels on smokeless tobacco products and in print advertising by Feb. 1, 1987.

[EDITOR'S NOTE: See accompanying story on page 40.]

There are several types of smokeless tobacco. Snuff and chewing tobacco are the industry mainstays. Twist and plug types account for very little in the way of sales and aren't sold extensively in the military.

There are some 12 million consumers of smokeless tobacco; half are regular users, said Health's Hensley.

U.S. Tobacco says it is continuing its hold on the market with the No. 1 and No. 2 two snuffs: Copenhagen and Skoal. The No. 1 chewing tobacco is Conwood's Levi Garrett; the No. 2 is Pinkerton's Red Man, according to industry sources.

market report

1985 Cigarette Sales on Military Bases By Resale System and By Area

SALES IN DOLLARS

Area	Domestic	Overseas	Worldwide
Exchanges*	$286,268,600	$ 62,843,800	$349,112,400
Commissaries	$250,208,000	$ 47,692,000	$297,900,000
Clubs	$ 53,233,000	$ 25,913,500	$ 79,146,500
TOTAL	$589,709,600	$136,449,300	$726,158,900

* Includes vending machines sales.

SALES IN UNITS (Cigarettes)

Area	Domestic	Overseas	Worldwide
Exchanges	10,877,181,000	3,342,975,000	14,220,156,000
Commissaries	12,142,635,000	2,740,856,000	14,883,491,000
Clubs	1,922,426,000	1,016,039,000	2,938,465,000
TOTAL	24,942,242,000	7,099,870,000	32,042,112,000

Research Department: Army Times Publishing Company.

Worldwide Cigarette Sales Growth

In Military Commissaries, Exchanges and Clubs

1985 to 1973 (in millions of dollars)

Year	Clubs	Commissaries	Exchanges	TOTAL
1985	79.2	297.9	349.1	726.2
1984	80.2	295.3	358.8	734.3
1983	81.1	274.5	369.9	725.5
1982	74.2	269.5	364.8	708.5
1981	69.1	251.0	347.8	668.0
1980	63.8	223.3	332.4	619.5
1979	58.6	207.2	308.2	574.0
1978	55.9	190.3	314.3	560.5
1977	52.1	171.4	294.6	518.1
1976	49.5	168.0	281.6	499.1
1975	48.8	167.0	273.6	489.4
1974	46.0	150.0	251.0	447.0
1973	43.0	139.7	249.0	431.7

Research Department: Army Times Publishing Company.

A recent Surgeon General report cited the increased popularity of smokeless tobacco among young males. TV commercials "used ball players and country music players aimed at male adolescents," Hensley said.

To reduce the potential political heat, the Smokeless Tobacco Council last year began a Youth Education Program to warn youngsters under 18 years old not to use smokeless tobacco products. "We believe it is an adult choice," said Bill Condon of Conwood Corp. The Smokeless Tobacco Council has also distributed 10,000 "Adults Only" signs to retail outlets.

The $1 billion industry was down 1 percent in 1985, according to the Smokeless Tobacco Council.

Despite the troubles in the smokeless market, not everyone is giving up. Helme Tobacco has recently introduced Lancaster chewing tobacco, a premium-priced product.

Comeback Possible for Cigars

Cigar smokers have long considered themselves a discriminating minority in the tobacco market. Although the cigar market declined considerably over the last 10 years, it plateaued last year. It is now showing signs of a possible comeback.

Men traditionally begin cigar smoking in their mid-30's. Baby boomer males are in that age-group now, said Leonard Saffir, a spokesman for the Cigar Association of America. The industry hopes that these men will begin smoking cigars.

The best sales are shown by high-grade or premium types, while domestic popular-priced cigar lines are still floundering.

Consolidated Cigar says the No. 1 cigar brand is its Dutch Masters. With the recent acquisition of American Tobacco's cigar lines, Consolidated now claims close to 50 percent of the cigar market.

Cigar production is only a small fraction of American Tobacco's business, said military sales manager Speck Henderson. "We're not able to stay in business with only a couple of lines of cigars. You need a lot more than three lines to make it profitable."

Ten million Americans smoked cigars in 1985, which resulted in $650 million in sales. MM

Is Beauty Biz Bottoming Out?

An overcrowded cosmetics and toiletries market threatens to collapse, analysts fear. There are too many new products, free gifts, and women and men who are yawning at it all. Associate Editor Jenice Armstrong files this update.

THE BEAUTY BUSINESS, WHICH ONCE seemed to face endless possibilities, now is on the verge of bottoming out.

"In real terms, the industry is overcapacity," William Fitzgerald, a beauty industry consultant, told MILITARY MARKET.

The industry is oversaturated because cosmetics and toiletries manufacturers are continually introducing new products to an already overcrowded market. This leads to lower profits for some makers, industry observers said.

"The way things are going, by 1990 the industry is going to be dominated by four or five major companies," Fitzgerald said. "The odds are greatly against survival" for smaller companies.

By the end of the century, the only remaining big players in the business will be Estee Lauder, Elizabeth Arden, Charles of the Ritz, Lancome and Avon, he predicted.

Fitzgerald, an economist, is president of W.J. Fitzgerald, a research firm that every month surveys 10,000 women to determine what their beauty habits are and what they like in the market.

According to what he's found, women don't get as excited anymore about new products.

"Women are not quite so enchanted with the romance of the old industry," Fitzgerald said. "They're just too damn many [products] ... How many perceptions can you have of a pink? They [manufacturers] overdo it."

To boost interest, fragrance and cosmetic manufacturers now routinely offer free goods such as a gift-with-purchase, and special purchase-with-purchase deals.

At present, in 35 percent of all fragrance sales there's a freebie attached. Thirty percent of color cosmetics offer free gift incentives. This has lead to lower profits, Fitzgerald said.

But while women may be buying fewer fragrances, men are buying more for themselves. Traditionally, men have relied on wives and girlfriends to purchase their fragrance products. But now, they are doing the buying themselves. Usually, it's men with higher incomes and higher education that buy their own fragrances, Fitzgerald said.

However, he thinks the move toward mens' color cosmetics isn't going to last. "I don't think it's going to be that successful," he said. "Men really don't care. They just don't get excited about it [makeup]."

One reason is that a man's skin is generally better than a woman's. "It lasts longer. It shows the affects of age less," he said.

In addition, men aren't as susceptible as women to cosmetics advertising. As an example, he pointed to Argyos, a fragrance he said was marketed toward gay men. "That thing fell on its tail," Fitzgerald said.

While he thinks men's cosmetics are a fad, he thinks mousse make-up products, like Elizabeth Arden's Simply Perfect Mousse foundation, are here to stay.

"I doubt that it's a fad. It feels good, looks good. The women primarily over 30 are buying it," he said. "Their sales are very satisfactory for that product ... There aren't enough of them [products] on the market, that are truly that type."

Fake Nails Provide A Real Jolt to Nail Care

NEXT YEAR, THE NAILS WILL HAVE IT, as this already-booming category gets an additional boost from new artificial nail products which are easier and quicker to use.

Press-on, stick-on or self-adhesive — they're known by a variety of names. Whatever their names, consumers agree the new nails are an improvement over the old ones, which often required waiting for messy glue to dry.

Since Lee Pharmaceutical introduced its first Press-On nails in February 1985, shoppers have been buying them so fast that some civilian retailers have had trouble keeping them in stock.

"It [Lee Press-on nails] grew so fast that it was difficult to keep up with production capabilities," said Dale S. Nepsa, Lee's national sales manager.

market report

PRESS ON!: Success of fake nail products is "difficult to keep up with . . ." Big names are Lee and Eylure of London.

Another reason stores have had problems keeping the product in stock is because some don't realize that Press-On Nails is a multiple sale item. A customer may purchase several packages at once in order to have various colors on hand.

The boost from fake nails comes at a time when the nail care business is enjoying increasing sales. Recent estimates put the industry at $794.8 million — a 12.9 percent increase over 1984, according to a recent survey conducted by *Product Marketing* magazine.

In the last five years, the industry has grown at the rate of 10.7 percent a year, according to the survey. The artificial nail category has jumped 12 percent since 1984, to $61.5 million in 1985.

Sales have increased, because American women are now putting more emphasis on their hands.

In the '60s, eyes were the primary makeup focus as women donned false eyelashes, heavy eyeliner and frosty shadows. Nails were ignored or were painted in frosted pastels.

During the health conscious '70s, women opted for long, healthy, well-cared for nails in natural colors, as well as bright reds, maroons, plums and browns. However, outlandish blues, greens, yellows and even black also had their place in the market.

The '80s businesswoman doesn't have the time to fuss with messy nail products. She wants nails that are quick and easy, according to industry observers.

Lee, which claims to be the first to introduce self-adhesive nails, is the biggest player in the market, with about an 85 percent share.

Eylure of London officials contest the Lee claim, saying they were the ones who introduced stick-on nails. "We really invented the press-on nail," said Stanley Sussman, Eylure president.

Eylure's nails are "shaped better. They're curvier," Sussman said. Eylure's EasiNails are available in regular, slimline, standard and slender styles. The kit includes nails, instant tape nail pads and instructions. Instant tape refills are also available for purchase.

The nails can be purchased on an open stock basis or from a counter displays or floorstands.

Jonee self-adhesive nails are available in four styles — oval, natural, extra long and two-nails-in-one. They are sold in clear plastic bags to allow customers to see and feel the products; they also allow retailers to stock a dozen or so packages on a single rod.

To educate retailers, Jonee produces a monthly newsletter and brochures about nail care and ways to use Jonee nails. The company also puts out a 22-minute videotape on how to care for and decorate artificial nails.

Because of the many different types of products, the artificial nail business can be confusing.

There are three basic types of nail lengtheners.

There are plastic nail tips, which attach to the end of the fingers. Another type attaches to the full nail with a semi-permanent adhesive for about five days. Press-on nails are "quick fix kind of nails" that stick on with a minimum of bother.

The newest nails are available in a variety of fashion colors. And Lee is selling nails in a new everyday "Active Length."

Lee will offer some special promotions with the Army and Air Force Exchange Service for Christmas and has plans to introduce their products to Navy exchanges.

"We're just tapping that market now," Nepsa said.

Cutting Costs, Copy-Cat Scents Catch Big Names' Coattails

HIGH-END SCENTS LIKE GIORGIO and Obsession are riding the wave of popularity, and knockoff fragrances like Primo and Confess have decided to hop on board.

The appeal of the copy-cat fragrance is cost. They're cheaper — a lot cheaper. And some consumers are opting for their favorite knockoff instead of the higher-priced name brand.

market report

"... WOULD SMELL AS SWEET": Knockoff fragrances by Parfums de Coeur and Delagar afford "an alternative."

And some brands, along such lines, are beginning to appear in exchanges.

"It gives the consumer an alternative," said Charles Royce, marketing director for Delagar, a manufacturer of gift toiletries. "She can now obtain some of these more expensive and exotic scents."

Knockoffs are now the fastest-growing segment of the cologne business, with sales doubling and tripling last year. Exact figures aren't available, because many major research companies haven't started tracking knock-off sales yet.

Overall, scent sales were up only four percent last year, according to A.C. Nielsen. Meanwhile, "The [knockoff] market is growing at a phenomenal rate," Royce said. "There have been no signs of abating."

This has some of the major perfume manufacturers irate and has lead to numerous lawsuits.

The courts, however, have generally sided in favor of the knockoffs, saying that it's okay as long as consumers aren't lead to believe they're buying the higher-end scent.

Since the scents first hit the market, the industry has expanded to include a number of new manufacturers eager to cash in on the copycat business. But the big leader is Parfums de Coeur, which has about an 80 percent share of the market.

Its biggest seller is Primo, which is marketed under the slogan, "If you like Giorgio, you'll love Primo!" Primo, which was introduced last year, generally sells for much less than what Giorgio costs.

"Instead of going to Rodeo Drive and paying $40, women can now make a trip to their Main Street drug store or supermarket and get the same wonderful fragrance for $7.50," said Mark Laracy, founder of Parfums de Coeur.

The first knock-off product Laracy marketed was Ninja. Its slogan was "If you like Opium ($30) or Cinnabar ($18.50), you'll love Ninja for $7.50."

Since its introduction, the line has been expanded to include gift sets and bath products. The mens' line includes Lancer, which copy-cats Polo, Apollo for Aramis, and Male Musk for Musk.

Although the knockoff scents mimic the high-end products, they're not just copy cats, Laracy argued.

"We've actually captured the essence of the most popular designer colognes," he said in a press release. "But our scents are not just imitations, often they're better," he maintained.

Delagar's Royce agrees that the colognes are high quality.

"We buy a very expensive perfume oil. We put a lot of it in the bottle. It's as good an oil as any fragrance being mass-marketed," Royce said. "Nobody except the experts can tell the difference."

The quality which really distinguishes these alternatives is how long they last.

The knocks-offs do not last as long as the big names do, Royce admitted. But then he quickly added, "That's not a bad trade-off for $7.50 versus $50."

Delagar aims to be the first in line to latch onto the coattails of Poison, a new scent by Christian Dior, which many experts predict will become the hottest seller during the Christmas sales rush.

Its launch this summer by Bloomingdales "was the most successful in its history," Royce said. "We will be the first ones on the market with our version."

But, aside from aiming for the coattail market, Delagar and other manufacturers hope that consumers will look to them as scents in their own right.

"We're really trying to build Mystic Impressions into a brand," Royce said. "We have planned next year to expand the line into other categories."

Another thing Delagar and other knock-off manufacturers hope for is to change the product's Christmastime promotion look and make it a year-round product.

According to Delagar's consumer research, two-thirds of the women they tested have no problems with buying the fragrance for themselves. Fifty percent said they would buy it as a gift. Eighty five percent of the women they surveyed said they would like it for a gift.

"There's a market [for knockoff products] virtually all year-around," Royce said. MM

market report

TRENDS AND OPINIONS ON THE USE OF COSMETICS TODAY

	DEFINITELY AGREE	SOMEWHAT AGREE	SOMEWHAT DISAGREE	DEFINITELY DISAGREE
Cosmetics are Important Part of Grooming Routine	85.2%	12.4%	1.6%	0.8%
Spend at Least 1 Hour a Day on Dressing and Grooming	56.2%	24.7%	10.9%	8.2%
Have Hair Done Professionally	52.1%	21.8%	12.9%	13.2%
Always Try to Improve Physical Appearance	73.0%	23.2%	3.4%	0.3%
How I Look is an Important Part of Who I Am	84.4%	13.4%	1.8%	0.4%
Not on a Regular Skin Care Program	15.3%	23.7%	15.8%	45.3%
Makes No Difference to Me What People Think of My Appearance	4.9%	12.5%	19.1%	63.5%
Physical Attractiveness is Mainly Knowing How to Make the Most of What You've Got	72.4%	22.7%	3.7%	1.2%
Clothes, Make-up, Hair-Style can Make an Ordinary Person Attractive	80.0%	18.3%	1.3%	0.5%
Women Look Better with Facial Cosmetics Than Without	56.2%	32.2%	9.5%	2.1%
A Well-Groomed Appearance is Important to a Career	90.5%	8.8%	0.6%	0.1%

MAJOR INFLUENCES IN CHOICE OF COSMETICS/FRAGRANCES

Magazine Articles/Ads	63.1%
Current Styles and Trends	49.4%
Gifts with Purchase or Store Promotions	43.1%
Career	40.2%
Scentstrips in Magazines	35.1%
Advice of Cosmetic Rep/Sales	34.5%
Amount of Time I Have	27.4%
Advice of Friends/Relatives	24.1%
Television Commercials	13.6%

PRODUCTS USED FOR SUN PROTECTION

Sunscreens or Sun Blocks	65.3%
After-Sun Moisturizers	64.7%
Suntan Lotions	59.0%
Lip Protection Creams	56.8%
Hair Conditioners	52.0%
Eye Protection Creams	29.7%

CATEGORIES OF COSMETICS USED REGULARLY

Lipstick/Gloss	93.3%
Fragrances	91.7%
Blush or Rouge	92.0%
Mascara	89.3%
Eye Shadow	84.6%
Moisturizers	84.0%
Facial Soaps/Cleansers	78.9%
Body Lotion	76.3%
Foundation	75.1%
Eyeliner	74.9%
Facial Powder	63.4%
Hair Spray	59.5%
Mousse & Gels	58.2%
Astringents/Toners	57.4%
Eye Cream	48.6%
Facial Masks	43.0%
Hair Coloring	40.0%
Lip Creams	37.5%
Enriched Bath Soaps	31.9%
Multi-Product Hair Care System	30.1%
Cell Renewal Treatment	21.4%
Depilatories/Waxes	18.3%

Courtesy of the Cosmetic, Toiletry and Fragrance Association. Survey conducted by the Cosmetic, Toiletry and Fragrance Association and Harper's Bazaar.
SOURCE: Beta Research Corp., March 1986.

market report

Toiletries/Cosmetics/Fragrances at AAFES

(Worldwide Sales Through May 1986)

Fiscal Year	Dollar Sales	Changes	% of Total
1983	270,404,047	+5.4%	7.85%
1984	281,175,962	+4.0%	8.00%
1985	289,555,000	+3.0%	7.39%
1986 Plan	301,434,000	+4.1%	7.28%
Through May 1986	93,900,000	+4.8%	7.22%

NOTE: Automotive/gasoline/labor is now included in retail total for the Army and Air Force Exchange Service.

Robert Hale & Associates, CONUS

When Makeup Is Worn —

ALL THE TIME	49.2%
AT WORK	44.6%
IN THE EVENINGS	28.3%
SPECIAL OCCASIONS/ HOLIDAYS	47.8%
WEEKEND DAYS	20.5%
WEEKEND NIGHTS	34.7%
EVERY NOW AND THEN	7.8%
DO NOT WEAR MAKE-UP	.5%

Number of Different Fragrances Own and Use —

1	9.7%
2 OR MORE	88.2%
3 OR MORE	71.8%
4 OR MORE	52.8%
5 OR MORE	40.3%
6 OR MORE	30.6%
7 OR MORE	23.8%
8 OR MORE	20.3%
9 OR MORE	16.8%
10 OR MORE	15.4%
11 OR MORE	10.0%
20 OR MORE	4.1%

How Often Fragrance Is Used in an Average Week —

1 DAY	2.2%
2 DAYS	3.7%
3 DAYS	4.9%
4 DAYS	4.9%
5 DAYS	12.7%
6 DAYS	11.0%
7 DAYS	58.6%

NOTE: Courtesy of the Cosmetic, Toiletry and Fragrance Association. Survey conducted by the Cosmetic, Toiletry and Fragrance Association and Harper's Bazaar. SOURCE: Beta Research Corp., March 1986.

Military Market index

COMMISSARIES

		JUNE			YEAR TO DATE		
		CY'86	CY'85	% CHANGE	CY'86	CY'85	% CHANGE
	CONUS	$144,889	$153,604	-5.67	$925,757	$911,521	1.56
	OVERSEAS	27,392	26,973	1.55	176,432	174,362	1.19
AIR FORCE	TOTAL	**172,281**	**180,577**	**-4.59**	**1,102,189**	**1,085,883**	**1.50**
	CONUS	104,685	109,200	-4.13	647,640	639,240	1.31
	OVERSEAS	34,650	31,185	11.11	211,260	186,375	13.35
ARMY	TOTAL	**139,335**	**140,385**	**-0.75**	**858,900**	**825,615**	**4.03**
	CONUS	71,604	74,009	-3.25	381,695	382,423	-0.19
	OVERSEAS	8,357	8,365	-0.10	43,813	42,709	2.58
NAVY	TOTAL	**79,961**	**82,374**	**-2.93**	**425,508**	**425,132**	**0.09**
	CONUS	13,037	13,971	-6.69	84,354	84,563	-0.25
	OVERSEAS	243	261	-6.90	1,589	1,490	6.64
MARINE CORPS	TOTAL	**13,280**	**14,232**	**-6.69**	**85,943**	**86,053**	**-0.13**
	CONUS	286	275	4.00	1,570	1,568	0.13
	OVERSEAS	293	360	-18.61	1,785	1,794	-0.50
COAST GUARD	TOTAL	**579**	**635**	**-8.82**	**3,355**	**3,362**	**-0.21**
	CONUS	$334,501	$351,059	-4.72	$2,041,016	$2,019,315	1.07
	OVERSEAS	$70,935	$67,144	5.65	$434,879	$406,730	6.92
COMMISSARIES	TOTAL	**$405,436**	**$418,203**	**-3.05**	**$2,475,895**	**$2,426,045**	**2.05**
GROCERY STORES	U.S.[1]	$22.813	$22.287	2.36	$135.329	$129.146	4.79

EXCHANGES

		JUNE			YEAR TO DATE		
		CY'86	CY'85	% CHANGE	CY'86	CY'85	% CHANGE
	CONUS	$251,758	$252,960	-0.48	$1,415,786	$1,387,819	2.02
	OVERSEAS	167,628	157,652	6.33	996,044	908,873	9.59
AAFES	TOTAL	**419,386**	**410,612**	**2.14**	**2,411,830**	**2,296,692**	**5.01**
	CONUS[2]	93,305	92,674	0.68	502,835	513,422	-2.06
	OVERSEAS[2]	41,519	38,712	7.25	220,745	217,105	1.68
NAVY	TOTAL[2]	**134,824**	**131,386**	**2.62**	**723,580**	**730,527**	**-0.95**
	CONUS	28,332	29,793	-4.90	163,474	168,528	-3.00
	OVERSEAS	4,977	4,918	1.20	29,029	28,835	0.67
MARINE CORPS	TOTAL	**33,309**	**34,711**	**-4.04**	**192,503**	**197,363**	**-2.46**
	CONUS[3]	7,159	7,096	0.89	40,006	39,060	2.42
	OVERSEAS[3]	553	526	0.76	2,979	3,038	-1.94
COAST GUARD	TOTAL[3]	**7,692**	**7,625**	**0.88**	**42,985**	**42,098**	**2.11**
	CONUS[4]	1,298	1,130	14.87	7,952	7,055	12.71
	OVERSEAS[4]	3,392	3,694	-8.18	20,060	18,534	8.23
MAIL ORDER	TOTAL[4]	**4,690**	**4,824**	**-2.78**	**28,012**	**25,589**	**9.47**
	CONUS	$381,852	$383,653	-0.47	$2,130,053	$2,115,884	0.67
	OVERSEAS	$218,049	$205,505	6.10	$1,268,857	$1,176,385	7 86
ALL EXCHANGES	TOTAL	**$599,901**	**$589,158**	**1.82**	**$3,398,910**	**$3,292,269**	**3.24**
DEPARTMENT STORES	U.S.[1]	$10.985	$10.447	5.15	$60.386	$57.408	5.19

CORRECTION: Marine Corps exchange sales in the May Military Market Index were incorrect. The correct figures for May 1986 Marine Corps and all exchange sale were:

	CONUS	29,537	31,133	-5.13	135,143	138,734	-2.59
	OVERSEAS	5,277	5,245	0.61	24,052	23,918	-0.56
MARINE CORPS	TOTAL	**34,814**	**36,378**	**-4.30**	**159,195**	**162,652**	**-2.13**
	CONUS	$384,863	$396,316	-2.89	$1,748,203	$1,732,230	0.92
	OVERSEAS	$233,372	$212,480	9.83	$1,050,807	$970,881	8.23
ALL EXCHANGES	TOTAL	**$618,235**	**$608,796**	**1.55**	**$2,799,010**	**$2,703,111**	**3.55**

1) SOURCE: U.S. Department of Commerce. 2) Does not include sales of ship stores. 3) MM estimate, based on official data. 4) Includes consolidated sales for all services, including Coast Guard. NOTE: Individual figures may not add to totals because of rounding. All sales are expressed in millions (add 000), except grocery stores and department stores, which are in billions. Commissary sales include appropriate surcharges; exchange sales include concession volume.